eMall Vol. 1

eMall User Guide

6/13/2006

Version 4

Table of Contents

OVERVIEW

These eMall User Guides, Volume 1 and Volume 2, describe the eVA requisition process, from shopping to order placement to receiving, as well as other eMall functionality.

EMALL VOL. 1 CONTAINS THE FOLLOWING SECTIONS:

- eMall Overview
- Accessing the eMall
- Navigating the eMall
- Logging out of the eMall
- Creating the Requisition
- Approving the Requisition
- Printing the Order
- Reviewing the History
- Modifying the Requisition
- Copying a Requisition

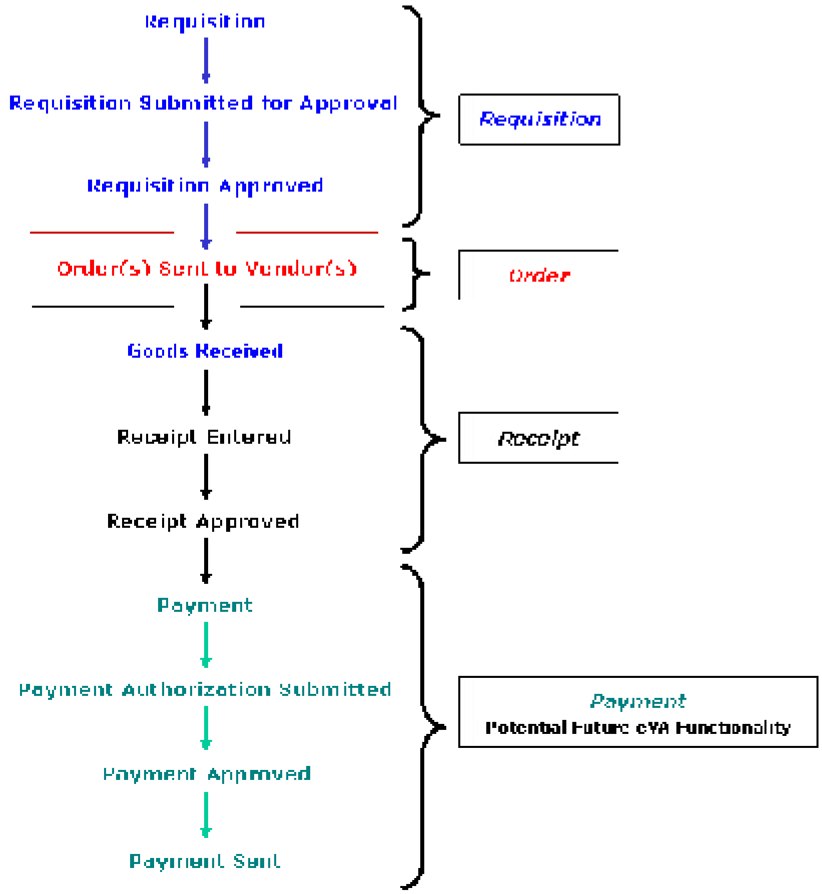
EMALL VOL. 2 CONTAINS THE FOLLOWING SECTIONS:

- eMall Overview
- Introduction to Receiving
- Receiving Ordered Items
- Receipt Approvals
- Other Receiving Functionality
- Preferences
  - Modify your Personal Profile
  - Email Notifications
- Explore
  - Searches
  - Exploring Catalogs
  - Adding Items from Saved Searches
  - Exploring Folders
- Operational Reporting
- Getting Answers to Your Questions

Although there is no reference to the word eMall inside eVA, it is commonly referred to in this guide. When a user selects **Shop Now** after logging into eVA, they are going into the eMall.

eVA Requisition Process

This volume focuses on the eVA Requisition process. The following diagram illustrates the steps in the entire procurement through payment process.



Purchase Requests and Orders

Within eVA there are several ways orders can be created. The most common is to create a Purchase Request (PR) in the eMall, submit it for approval, then apply all approvals. The eMall creates a purchase order (DO, EP, or PCO) from the approved Purchase Request and delivers the order to the vendor.

(If your agency is enabled for complex eProcurement, your eVA orders will begin with an EP. Otherwise, your eVA orders will begin with DO unless you are using a purchase card, in which case the order will begin with PCO.)

There are several types of requisitions and purchase orders, as follows:

Requests

Some purchase requests (PR's) begin in the eMall, others are brought into the eMall from another source.

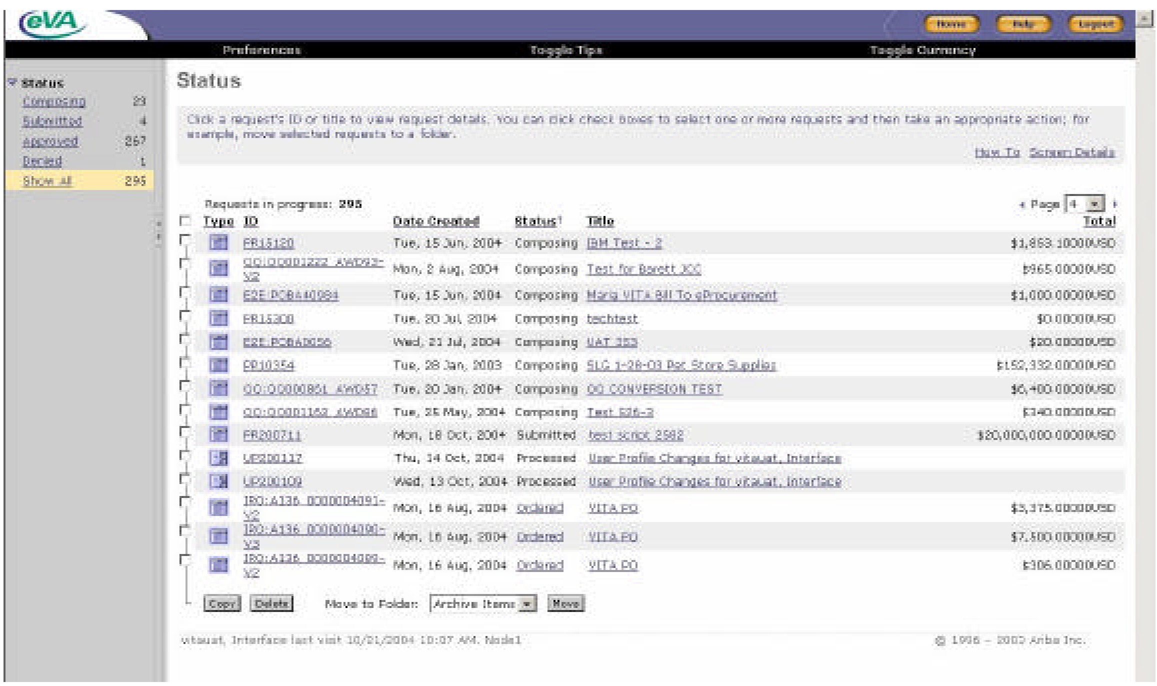
Document	Source	Naming Convention
Purchase Request	eMall	PR
User Profile	eMall	UP
Quick Quote Award	Quick Quote	QQ:QQ
End-to-End Award	eProcurement	E2E:POB
Imported Requisition	Order Import (Agency Interface)	IRQ:Axxx

Orders

Orders are generated automatically by the eMall from approved requests.

Document	Source	Naming Convention
Direct Order	eMall (agencies not using eProcurement)	DO
EProcurement Order	eMall (eProcurement agencies)	EP
PCard Order	eMall	PCO
Quick Quote Award	Quick Quote	QQ
End-to-End Award	eProcurement	POB
Imported Order	Order Import (Agency Interface)	DO, PCO, EP

Below is a sample status screen showing a variety of requests.



Imported and Exported Orders

The eMall allows agencies and other entities to send order requests from the entity system to be fulfilled through eVA. The eMall can also send completed order and receipt data for entity systems to pick up for their own use.

Imported Orders

Order information can be imported into the eMall for fulfillment by eVA and the Ariba Supplier Network (ASN). (See the eVA Overview Guide for information on the ASN.)

These orders are imported as purchase requests that begin with the IRQ: prefix. The requests may be submitted to require approvals in the eMall, or to move directly through the eMall edits to become purchase orders without user intervention.

Imported orders are subject to the same requirements and edits as orders that are entered online as requisitions.

Exported Order and Receipt Data

Each day's purchase order and receipt transactions are made available to the entity's system for their use.

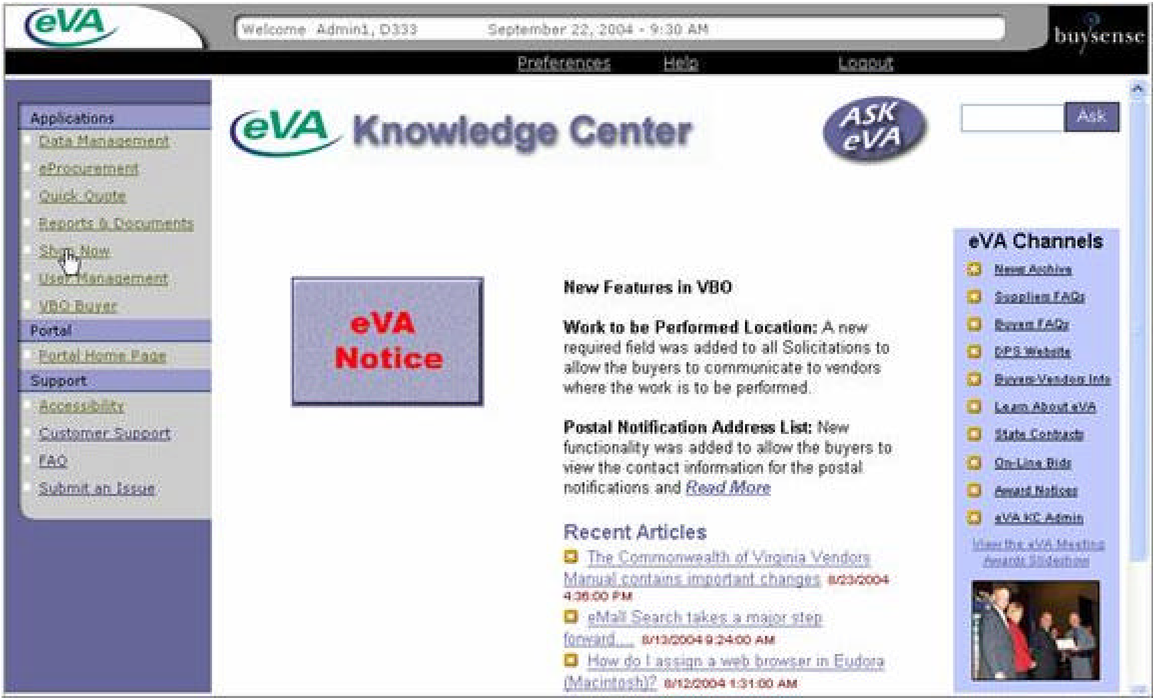
Exported data is available as a daily report that follows a common template. Entity systems can retrieve the report for their agency (entity) and use the order and receipt data as they wish.

ACCESSING THE EMALL

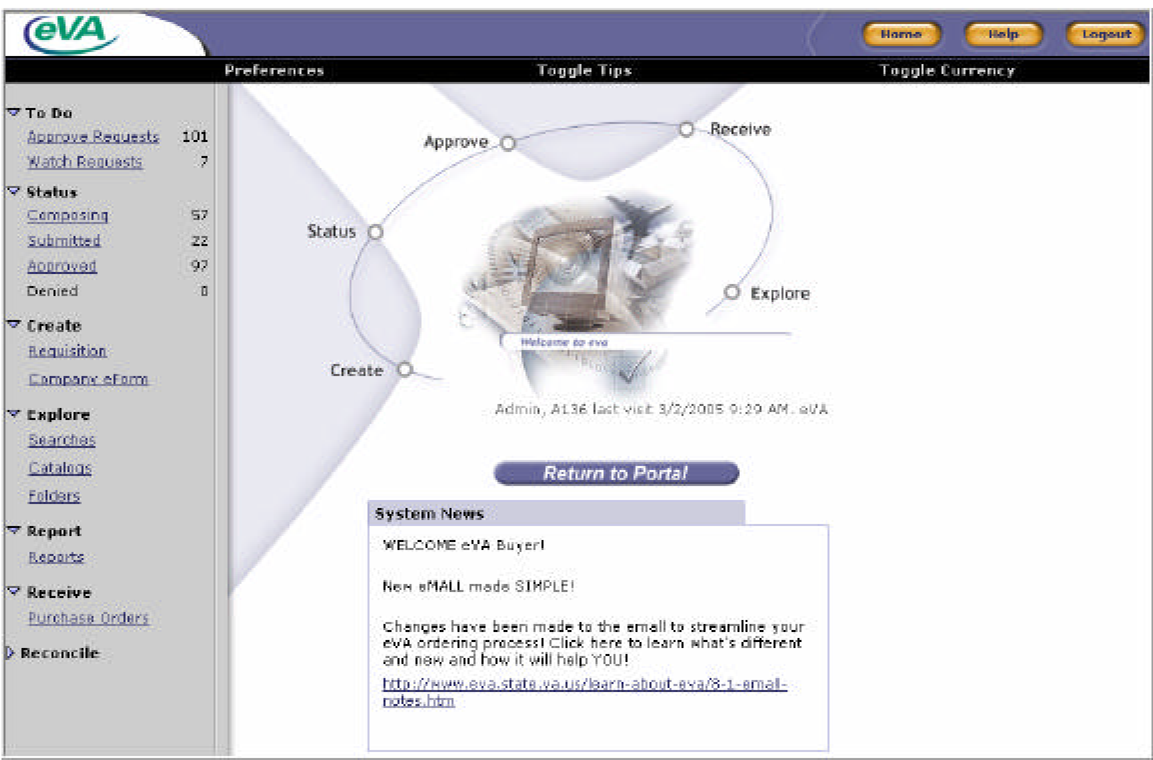
To access the eMall, go to the eVA Home page, www.eva.virginia.gov, and enter your username and password in the Buyer Login box.

A successful login will take you to eVA's front page within the eVA Buyer Portal.

Select the **Shop Now** link on the left menu to access the eMall.



You are taken directly to the Swoosh screen (eMall Home page) of the Ariba Buyer application.

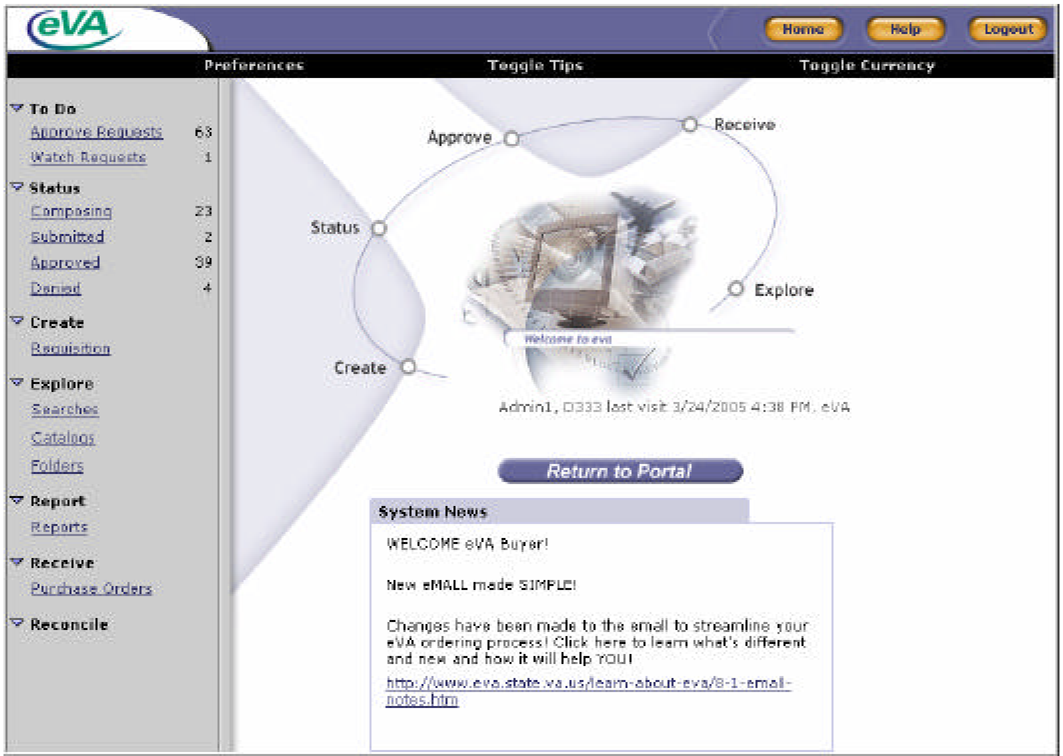


NAVIGATING THE EMALL

Once you have selected the **Shop Now** link, the Swoosh screen opens, and you are ready to begin the eMall shopping experience.

The Swoosh screen provides links in three sections to navigate in the eMall:

- Command Bar (black bar on top of screen)
- Navigation Panel (left-side menu)
- Swoosh image (image in center of screen)



Command Bar Commands

You can use the Command Bar to take several actions. The Command Bar is always present, no matter which screen is displayed below it.

Command	Function
Home	Return to the Home page. If you select **Home** while you are composing a request, the eMall provides you with the option to delete or to save that request.
Help	Browse through links or search for help by keyword within Ariba's Online Help.
Logout	Return to the eVA portal login screen. If you select **Logout** while composing a request, the eMall provides you the option to delete or to save that request.
Preferences	Review your eMall profile, to request changes, and to reset your user preferences through the User Profile Wizard.
Toggle Tips	Turn inline help tips on or off when available. Toggle tips provide helpful information about the fields, buttons, links, and messages on a screen.
Toggle Currency	Toggle between any two previously selected currencies for non-catalog items.

Left Menu Commands

The left menu (Navigation Panel) gives you a snapshot of your work in progress.

The left menu contains links divided into 6 main areas representing different groups of activities.

Commands	Function
To Do	Access requests that you can approve, deny, watch, or forward to another user.
Status	Access requests that you are composing or that have been submitted, approved, or denied. Select any status link to see details about the associated items.
Create	Create requisitions.
Explore	Access various folders used by the eMall Explorer to keep track of what's happening, sort and organize, and search through the system to find particular documents that interest you.
Report	Access standard operational reports and reports that you have previously saved.
Receive	Start your Receiving process.

When working in other parts of the eMall, such as creating a requisition or running a report, the left menu is referred to as the Process Step area as it shows the numbered steps for the current task.

Swoosh Commands

The Swoosh commands are the primary functions you use to create requests, view their status, approve requests, receive items, or explore catalogs and other items you have saved.

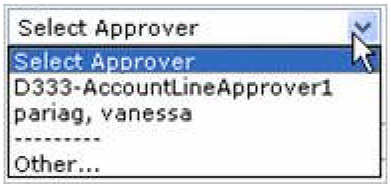
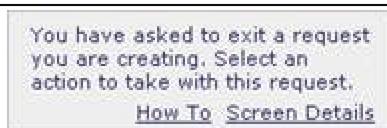
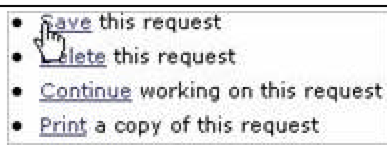
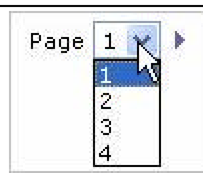
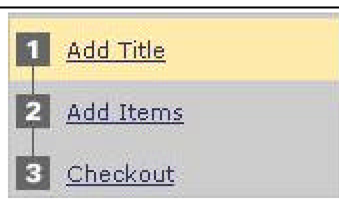
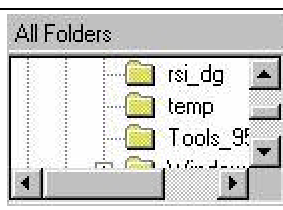
You may select any of these options to go to the associated screen(s) and begin working.

Command	Function
Create	Begin a new request (such as a purchase requisition) using the eMall wizards that walk you through a series of pre-defined screens.
Status	Check the status of requests that you've submitted for approval, copy a request, or to continue working on a request that you started earlier.
Approve	Find requests that require your attention. From here, you can approve or deny any requests in your Required Approvals folder. Watchers use this box to view Optional Approvals.
Receive	Acknowledge that you have received goods that were ordered. If you don't have any outstanding orders to receive, the Receive folder contains no items.
Explore	View the various folders found in the eMall Explorer. You can use the Explorer to keep track of what's happening, to sort and organize requests, and to search through the system to find particular requests that interest you.

Several of the links and commands in the three sections of the Home page perform the same functions. You can choose the options with which you are most comfortable.

User Interface

The table below discusses nine different tools in the eMall User interface that you will use as you work with the eMall screens.

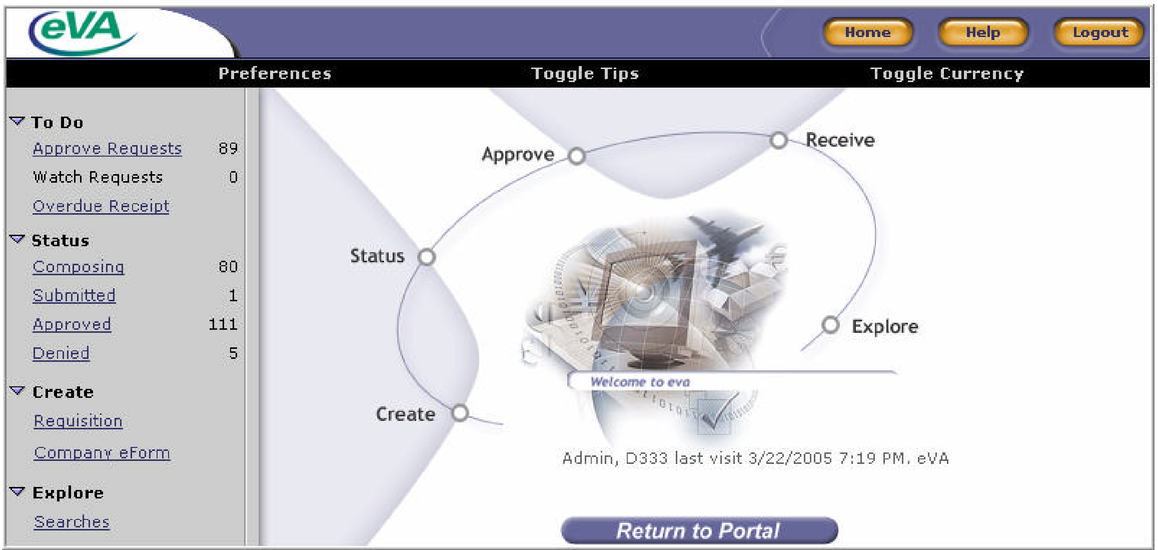
Tool	Example	Function
Calendar icon		Select the Calendar icon to open the Select a Date screen (with calendars for nine consecutive months, starting with the current month). Use these calendars to select a date for the associated field. You can also enter a date manually.
Drop-down list		Select the down arrow to open a list of available values for a field. Some drop-down lists have pre-set values; others are populated by your recent selections. Select *Other* to obtain a list of all valid options for that field.
Field tips		When you hover your mouse over a field, link, or button, a yellow text box explaining the purpose of the option appears.
Inline Help Tips		All eMall screens contain at least one inline help tip that briefly explains the purpose of the screen and the basic actions that you can take. Select **Toggle Tips** in the Screen Header to turn this option off.
Link		When you point to underlined text and the pointer displays as a hand, you are pointing to a link. Selecting a link will take you to a new screen or web site.
Multiple page navigation		When multiple pages of data are available, select the drop-down list for the arrows to navigate the pages. You can also select on a page number directly to proceed to that page.
Process Step area		The Process Step area guides users through the steps required to complete a task in the order in which they are listed. Unlike a conventional wizard, you can jump to any process step in any order.
Navigation buttons		Select a navigation button to move between the eMall screens, to move between steps in an the eMall process, or to exit the current process. DO NOT use the browser navigation buttons.
Scroll bars		Select and slide the scroll bars at the right side or bottom of an eMall screen to view information that may not initially be visible.

Tool	Example	Function
Sorting	**Order ID**↑ **Title** EP200128 Script 1014 EP200129 Script 1014	Select any underlined column heading to sort the information in that column in ascending order. Select the column a second time to sort the information in descending order. An arrow next to the column heading indicates whether the information is sorted in ascending order (up) or descending order (down).

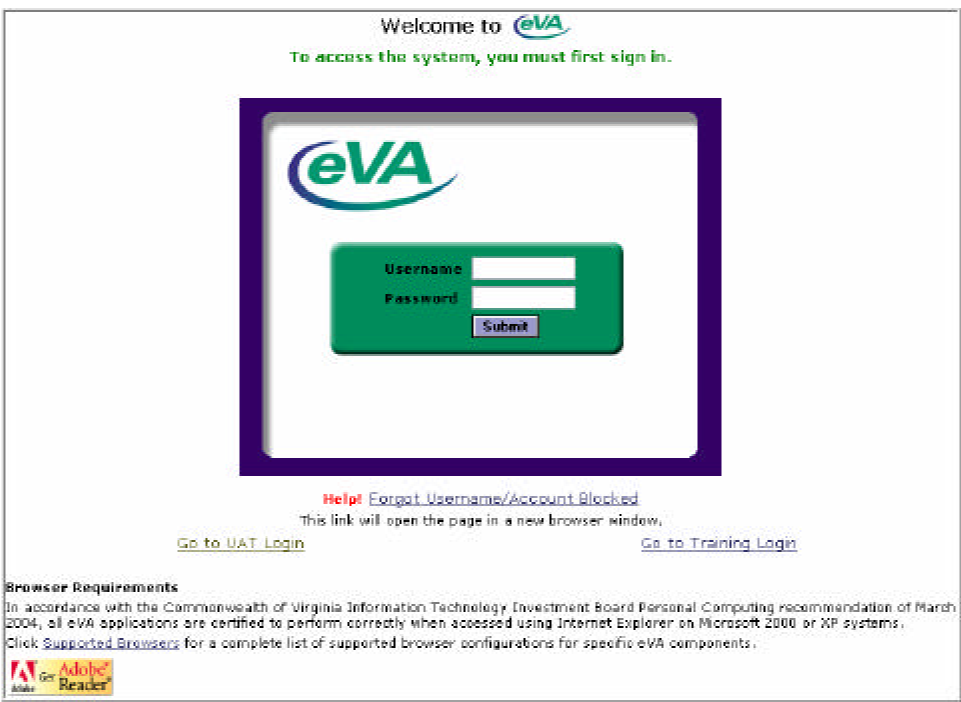
LOGGING OUT OF THE EMALL

Logging out of the eMall will return you to the eMall Login Screen. It is important to logout as closing your web browser does not log you out of the eMall application.

You may select **Logout** in the **Screen Header** on any screen.



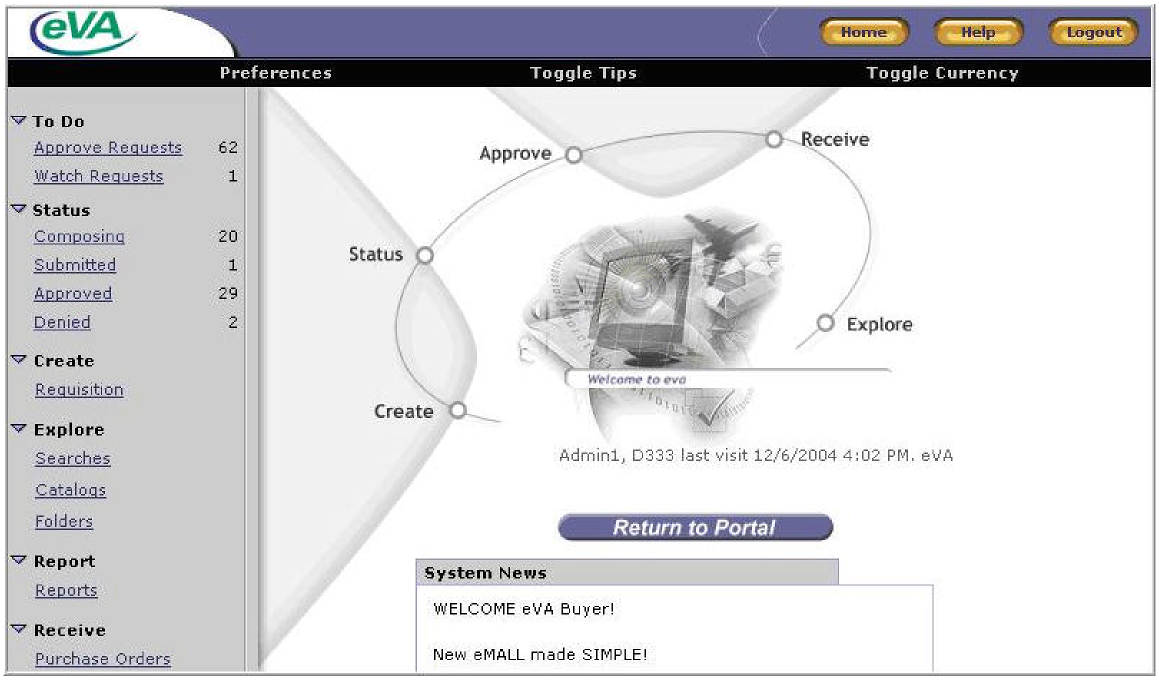
If you do not log out of the eMall, you will still be active in the system until you are timed out. Timing out occurs when you are idle in the system for 60 minutes.



For example if you are logged into the eMall and leave your desk for a meeting, the system will log you out after 60 minutes. The system does this as a security function to protect you and your account.

CREATING A PURCHASE REQUISITION

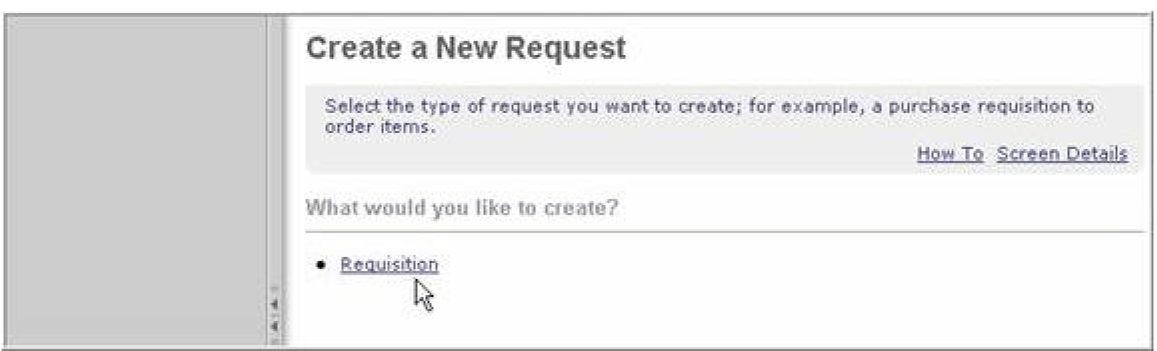
There are two ways to create a new requisition from the eMall home page (commonly referred to as the Swoosh screen):



Select the **Requisition** link from the left menu, or select **Create** from the image in the center of the Swoosh screen.

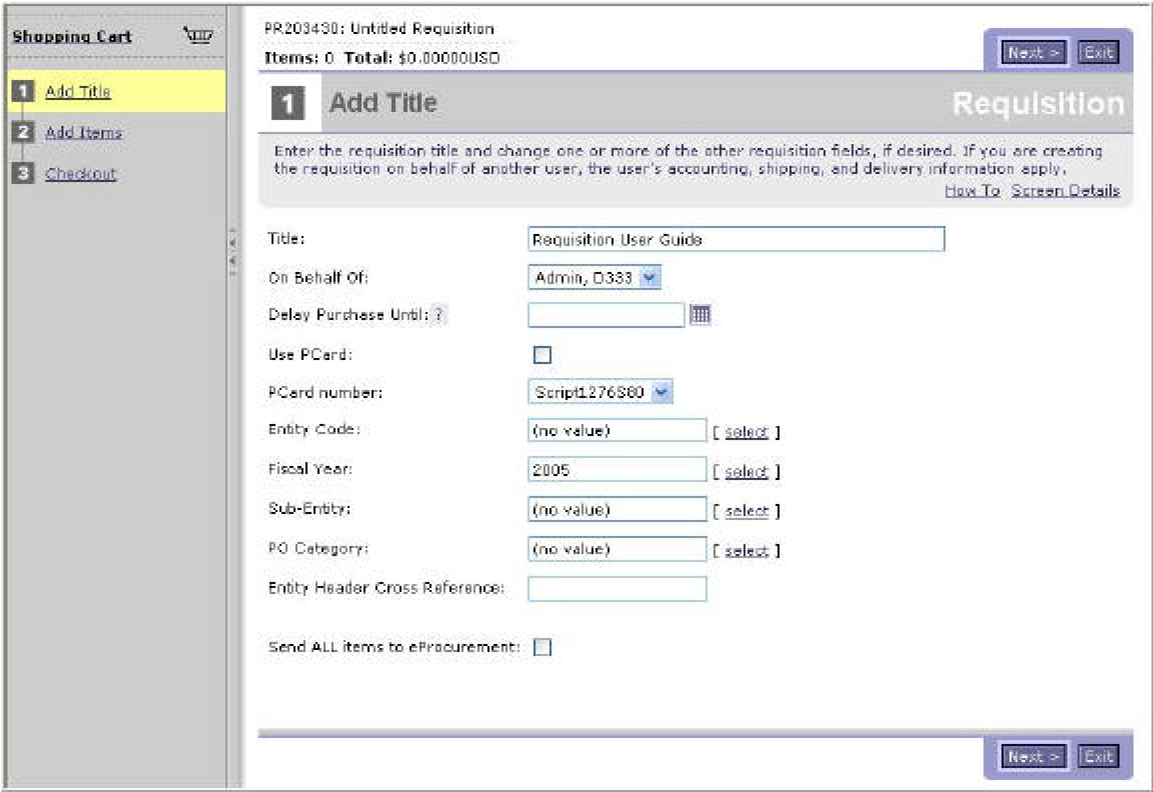
If you selected **Create** on the Swoosh screen, the Create a New Request screen (below) will open, prompting you to select the type of request. (Some users may have other request types available, but most eMall users will only see the **Requisition** link.)

Select the **Requisition** link.



Step 1: Add Title

The left menu shows three steps needed to complete a requisition. As you access each step, the area is highlighted.



The eMall assigns a unique number to each requisition. In this example, it is Requisition PR203430.

When you open a requisition, the shopping cart is empty (zero dollars and zero items). As you add items to the requisition, your shopping cart will reflect the current number of lines and the current total dollar amount of your requisition.

You can select the **Shopping Cart** link or the icon at any point to view a summary of the items in your shopping cart.

Complete the following fields as appropriate:

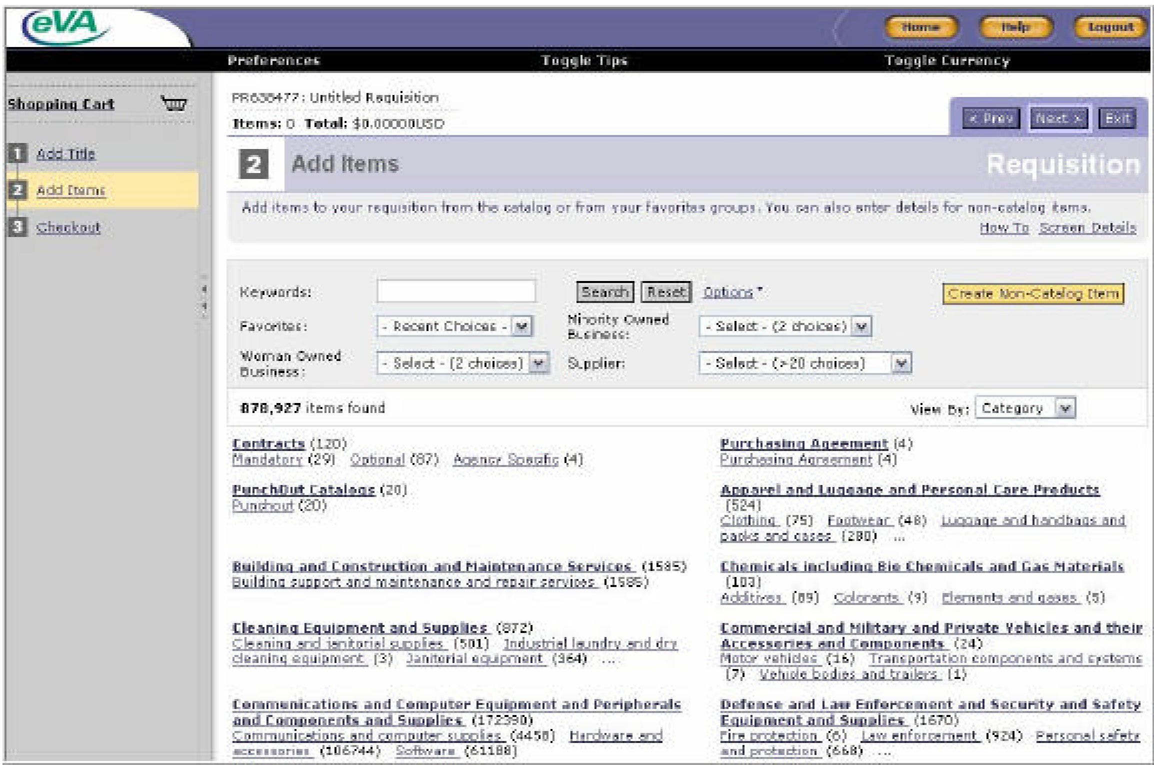
Field	When and How to Use
Title	To help you distinguish between your various requisitions, you may type a Title for each order. This title does not need to be unique on each requisition, but it can be a critical piece of information as you can conduct system searches in the future. Many users utilize this field to segregate "types" of orders (e.g. Police Division – Jerry Wray).
On Behalf Of (use with caution)	Your user name will automatically appear in this field. If you are completing this requisition for someone else, select the person's name from the list to be the Requester. (If the user is not on the dropdown list, select *Other...* to conduct a search.) The Requester's accounting, shipping, and approval flow information is inserted for the requisition. When the requisition is submitted, the Requester will automatically be notified by email.
Delay Purchase Until	You can enter a future date to prevent the order from being generated and sent to the vendor until this date. The requisition can be fully approved, but the order will not go to *Ordered* status until the morning of the date entered. To enter a date, either type the date in MM/DD/YY format or select the calendar icon and select the date. If left blank, the requisition becomes an order as soon as it is approved.
Use PCard	If you have access to your organization's Purchase Card (AMEX/Visa/MasterCard), you will have a checkbox that is automatically selected when you create a requisition. If you are creating a non-PCard order, deselect this box, and the order will be a Direct Order without PCard information.
PCard Pick List	If you are creating a PCard requisition and have access to several PCards, select the appropriate PCard Alias from the dropdown.
PO Category	This category describes the type of purchase requisition; from routine order to emergency orders. The default is R01 (Routine Order). Certain values in this field are used to route requisitions from state buyers to the Department of Information Technology (VITA) for processing. In addition, certain PO Category values are for Exception purchases that may result in an additional purchase order transaction fee to the agency/entity. Use with caution when choosing an exception PO Category (ending in *02*). See the VA Procurement Manual for information on this field.
Header Cross Reference	This field can be used to insert your own number for this order. If you are working in an agency or entity that imports the order from a financial ERP system, a number could display in this field to represent the ERP order number. (This field is used at the discretion of each agency/entity.)
ERP Requisition Number	This field may display for agencies/entities that choose to display the ERP requisition number on an order imported into eVA.
Send ALL items to eProcurement	This field will not display for agencies/entities that are not enabled for complex eProcurement. For those agencies that are enabled, you may utilize this checkbox, based on your business rules, to send all line items to the Purchasing professionals in your organization (or designated agency) for sourcing, rather than creating a purchase order to a vendor.

When you have added all necessary information on this screen, select **Next** or select **Add Items** in the left menu to continue.

Step 2: Add Items

On the Add Items screen you may add items to your requisition. There are four ways to add items to a requisition:

1. Add items by selecting from vendor - provided catalogs
2. Enter an item as non-catalog item (i.e., not selected from an electronic catalog).
3. Select an item that you previously saved as a favorite
4. Select an item from a search that you have saved



How to Find Items

Catalog items are categorized by commodity type to help you find the items you need.

Commodity categories are dynamically built based on items available in vendor catalogs. Each product category is displayed in bold text, with sub-categories displayed beneath it.

There are various ways to find catalog items:

- Commodity searches are done like other web sites, such as eBay, drilling down through a hierarchy of commodity categories to get to a group of similar items
- Keyword searches allow you to find items with specific words, vendor (supplier) names, contract numbers, or product numbers
- Advanced search options provide detail fields that allow you to refine a search even further
- “PunchOut” catalogs take you to a vendor’s web site for shopping. Direct links to these catalogs can be found in a special **PunchOut Catalogs** category, as shown on the above screen.

Sorting the Search Results

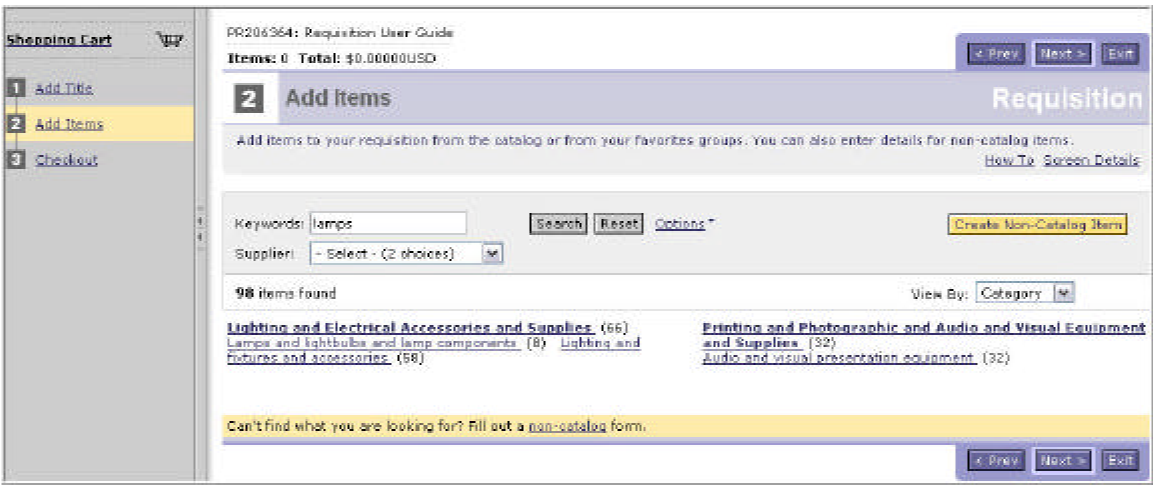
Before learning how to search for an item, it is helpful to first understand how your search results will be displayed.

The **View By** drop-down list allows you to sort returned items in several ways.

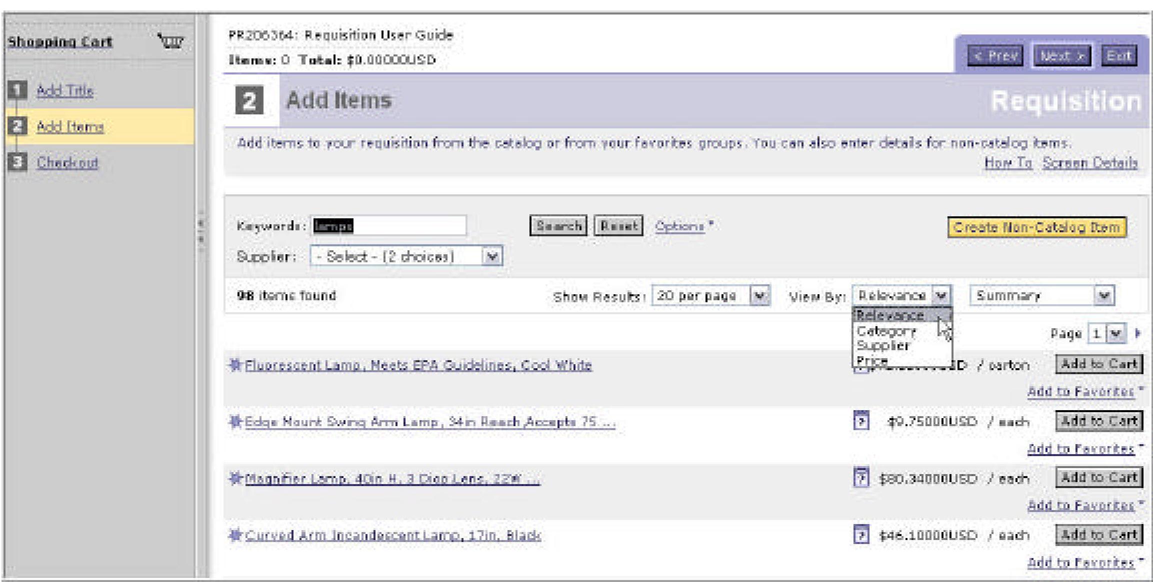
View By Option	Sort Method
Relevance	Best match to keywords
Category	Commodity categories
Supplier	Alphabetically by vendor/supplier
Price	Ascending price order (lowest to highest)

The default View by is Category, meaning that your search result will be sorted and displayed by category.

The example below displays search result of *lamps* with a View by: Category.



If you prefer to see the actual items listed, change the View By: to Relevance.



You can choose to re-sort your search results by Supplier or Price.

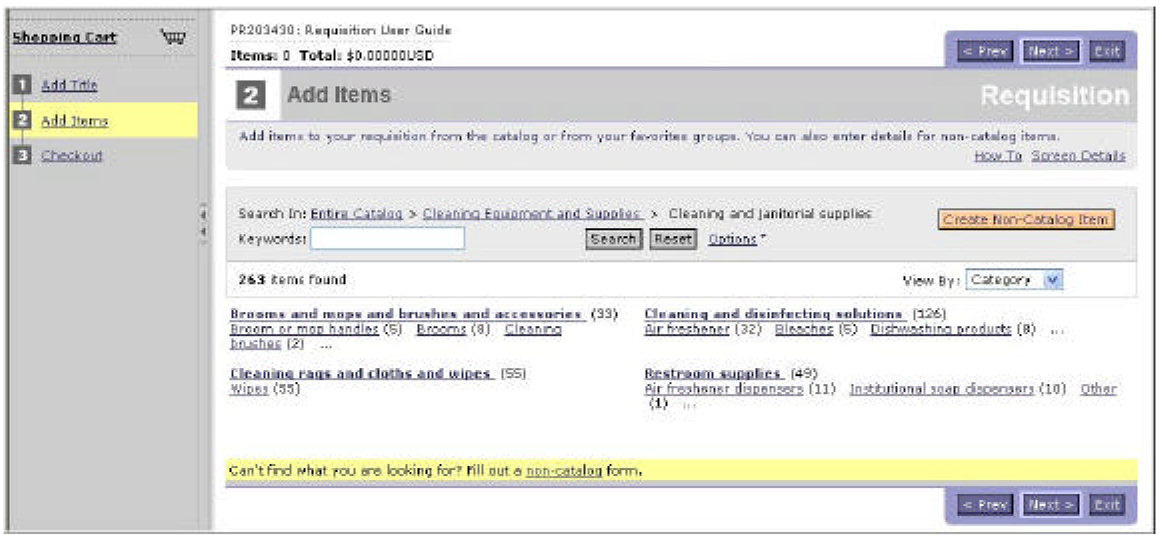
Option 1: Drill Down through Commodity Categories

Select the highest level of one of the displayed categories and drill down through the sub-categories to find the specific set of items you want.

To find your specific group of Commodities, drill down through the 4 levels of subcategories, as in this example:

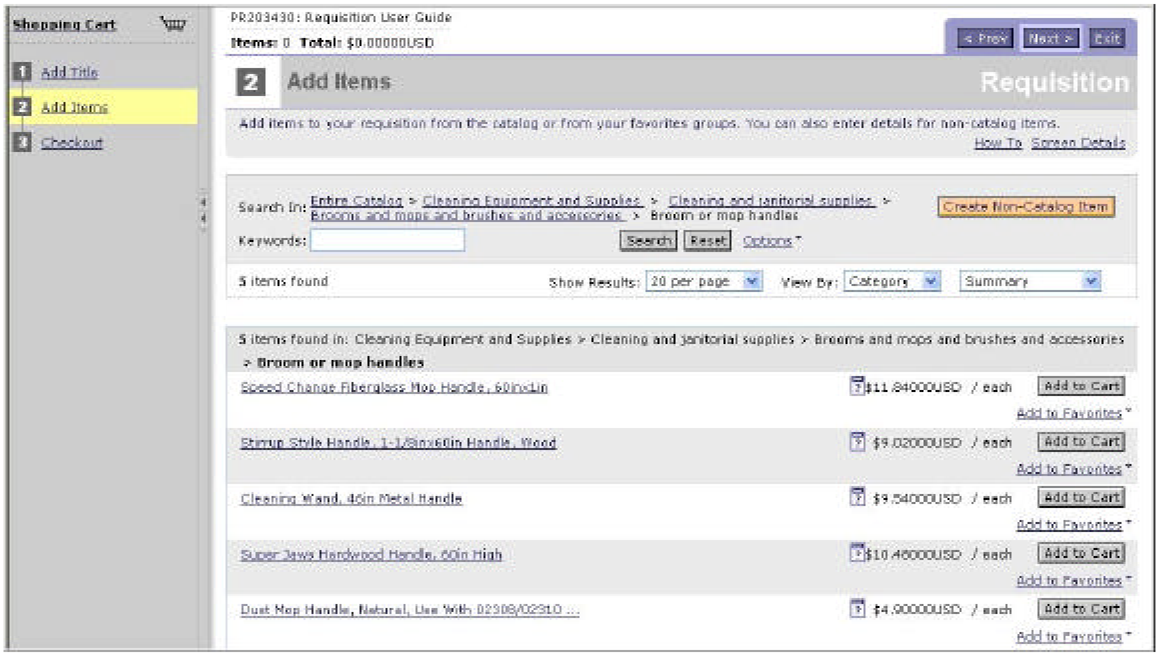
Catalog Level	Example
Segment	Lighting and Electrical Accessories and Supplies
Family	Lamps and lightbulbs and lamp components
Group	Lamps
Category	Fluorescent lamps

Some items may not have been identified down to the Category level. If they have only been classified down to the Group level, they will show up in a category labeled *Other*, as shown on the next screen.



eVA displays the description, unit price, and unit of measure for every item related to the selected product category/sub-category criteria.

A mouse trail displays the levels that you took to get to an item listing. In this example you went through the *Entire Catalog > Cleaning Equipment and Supplies > Cleaning and janitorial supplies > Brooms and mops and brushes and accessories > Broom or mop handles* to reach this listing. You may select any link in the mouse trail to return to that particular product category.

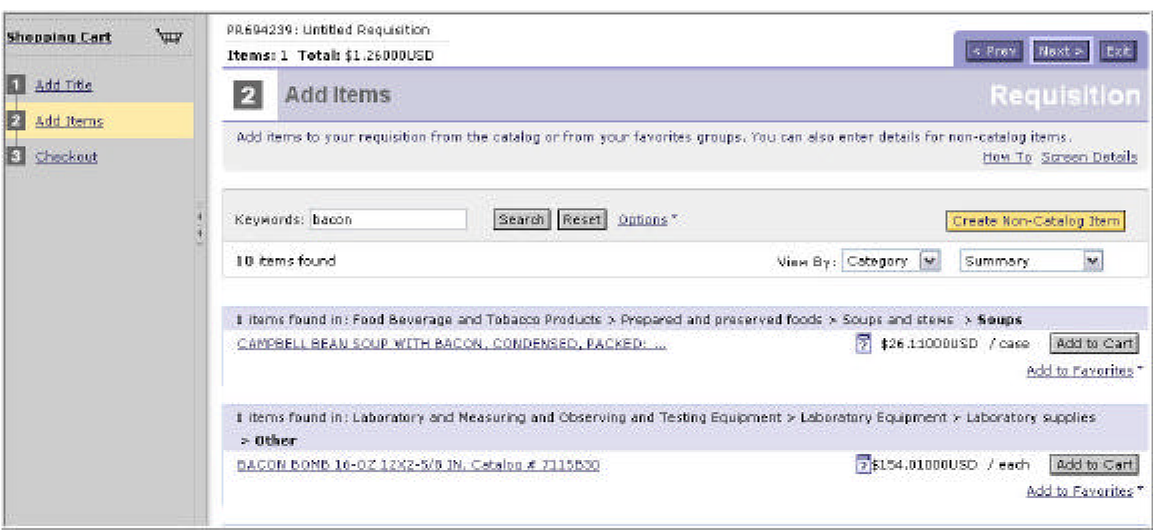


Option 2: Search by Keywords

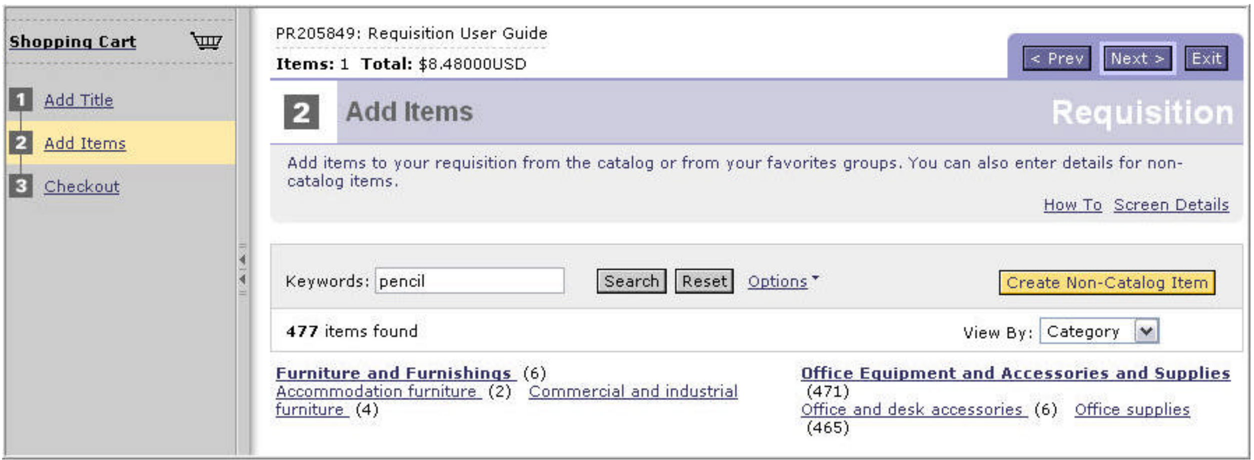
The Keyword search uses a single box for entering keywords, just like any Internet search engine.

Enter appropriate terms or data in the Keywords box, such as the contract number, part number, or descriptive words.

For example, type *Bacon* in the Keywords text box and press **Search**.



In some instances, if your keyword is too broad, such as the word *Pencils*, Ariba will drill down the family or group that contains the keyword *Pencil*.



AND/OR LOGIC

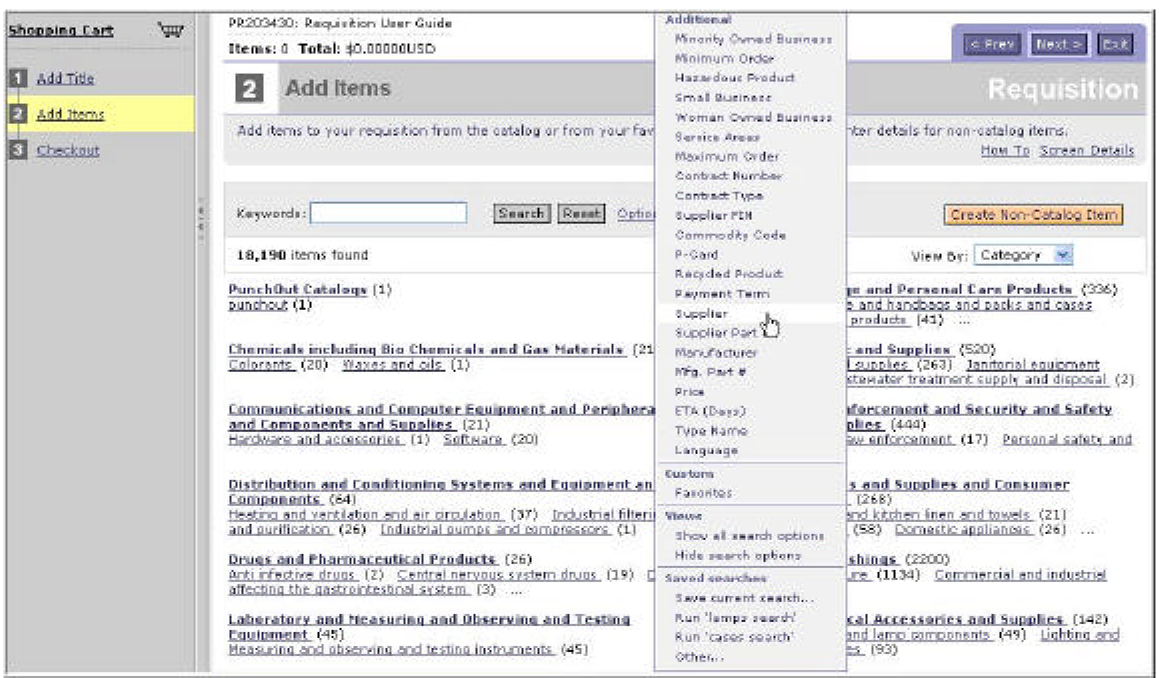
If you enter more than one word, it is assumed that you want only the results that have *all* of the word strings you have typed. For example, if you type APPLE MACINTOSH, eVA may only return a Macintosh Apple computer and its family of parts or peripherals.

If you prefer to find items that have *any* of the word strings you have typed, you must specify OR between words. For example, if you type APPLE OR MACINTOSH, eVA will return all entries for apples and all entries for Macintosh products.

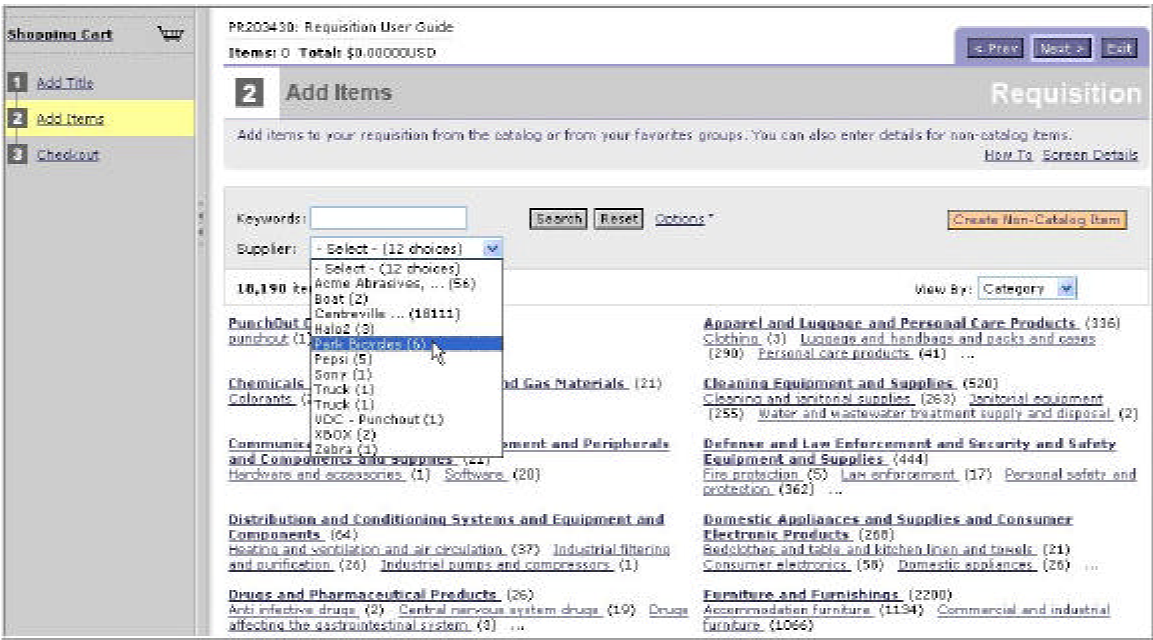
Option 3: Search by Keywords with Options (Additional Fields)

You can create a more specific search using the Additional search tools under the **Options** menu.

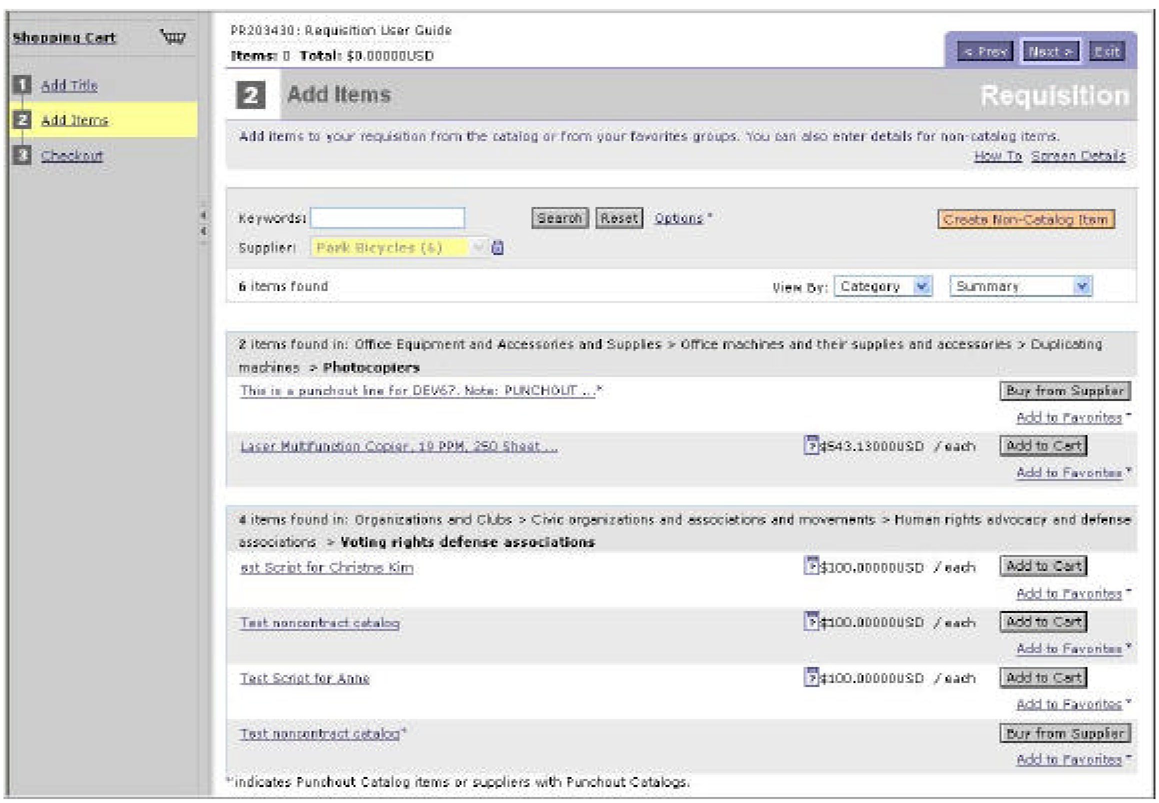
Select the **Options** link, and then select search fields from the menu that opens. You can only select one field at a time.



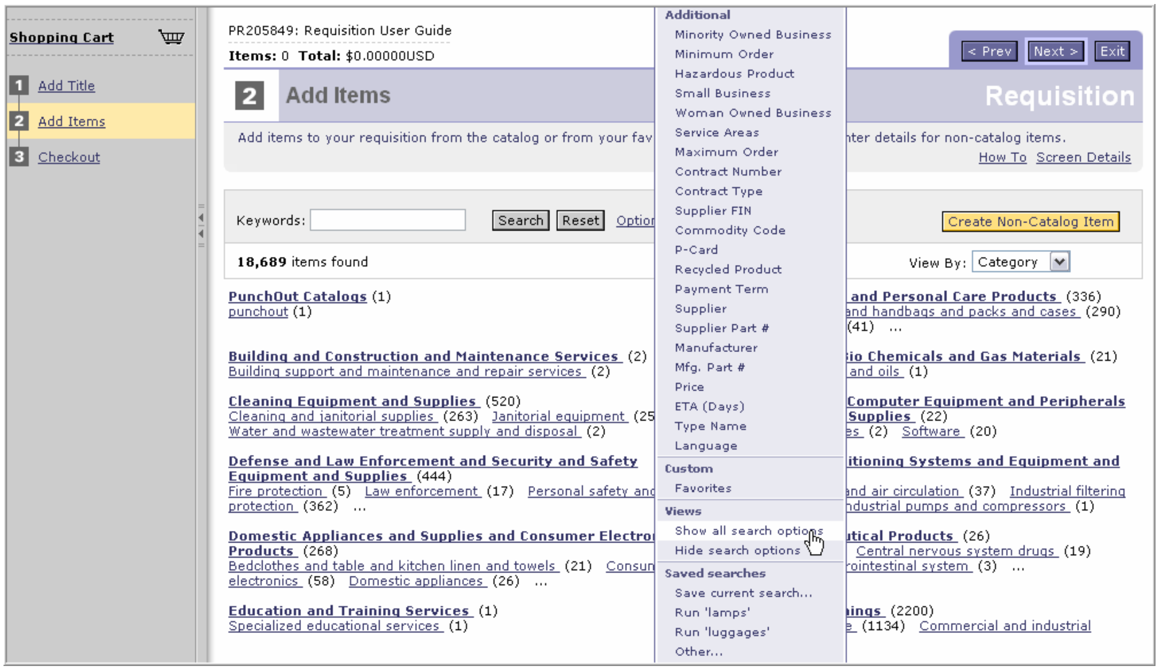
Selecting a search field adds the field to your search window, below the Keywords field. You can add several fields for a narrower search.



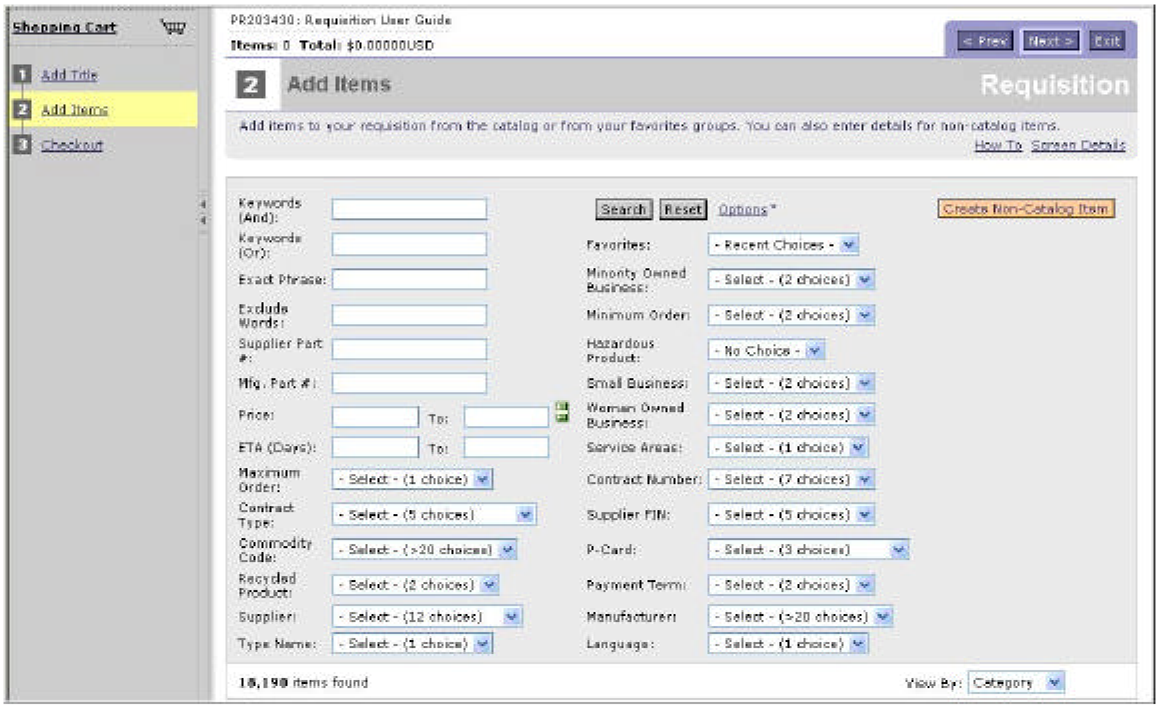
A lock icon appears next to your selection to indicate that all displayed items meet the criteria in the locked field. To remove the locked selection, select the lock icon or the Reset button.



You can view all search options by selecting *Show all search options* from the Options menu.



The number of choices represents the number of different values within the catalogs that are being searched.



KEYWORD OPTIONS

You can also specify additional logic to broaden or narrow the scope of your search.

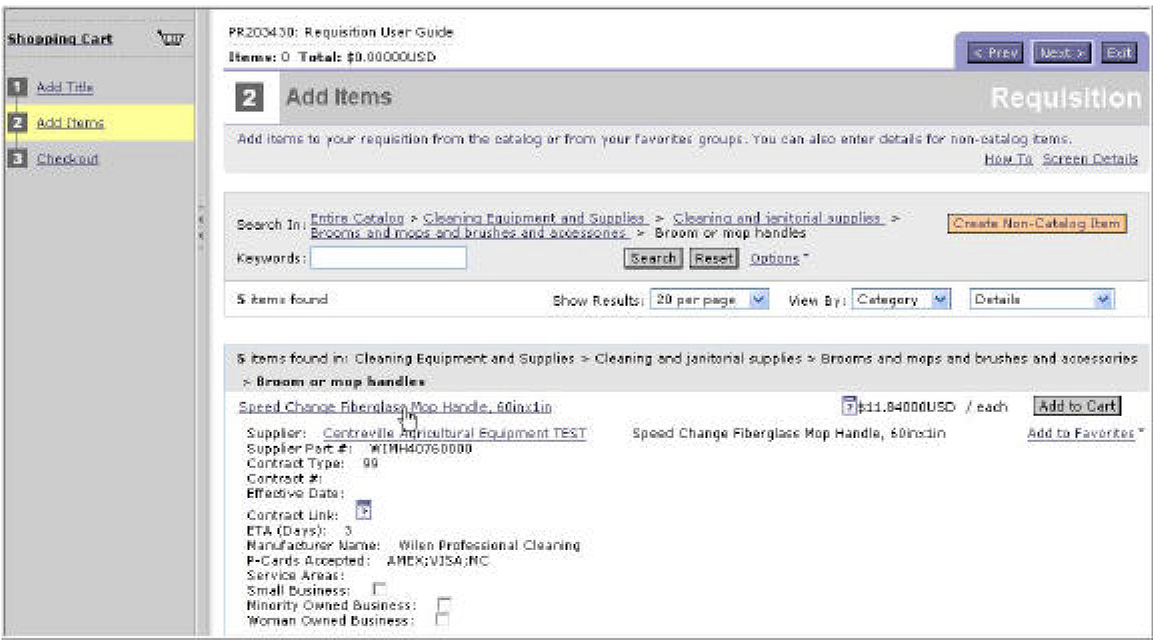
Catalog Types: Hosted and Punchout

There are two formats for eVA catalogs that use different methods for searching and selecting items: hosted and PunchOut.

The process for adding an item to your requisition changes slightly depending on whether the item is from a hosted catalog or a PunchOut catalog.

HOSTED CATALOGS

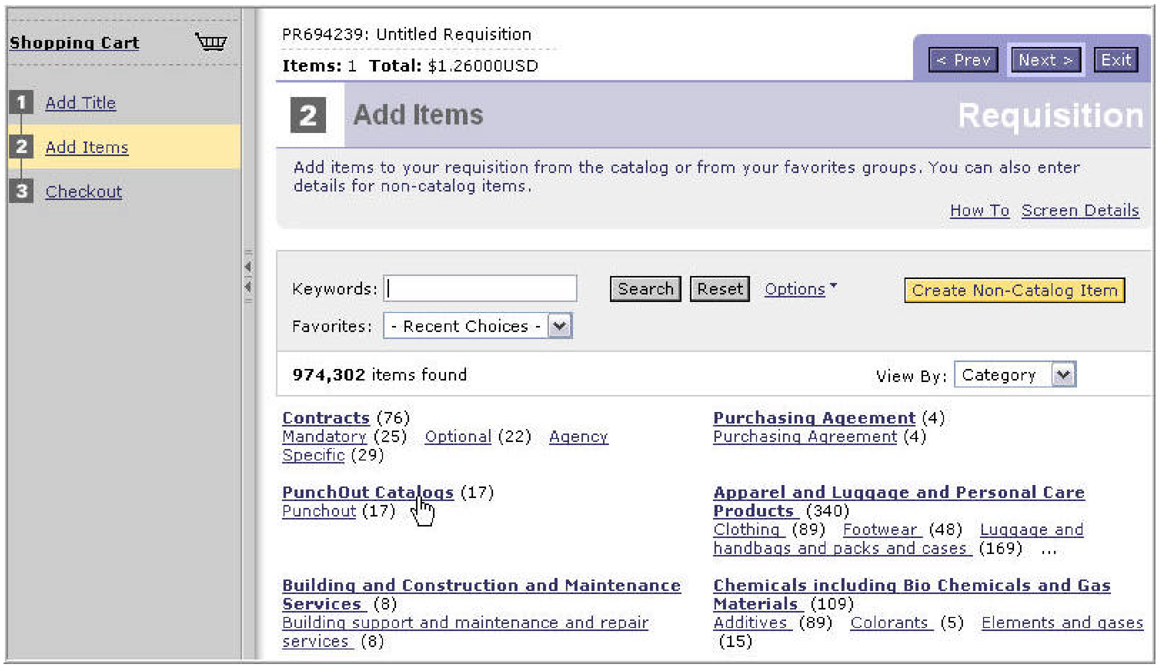
A hosted catalog displays all of the details about each item on the Search Results screen–description, supplier, price, etc. The right-hand side of each hosted catalog line contains an **Add to Cart** button. Selecting **Add to Cart** will pull the line item details into your requisition.



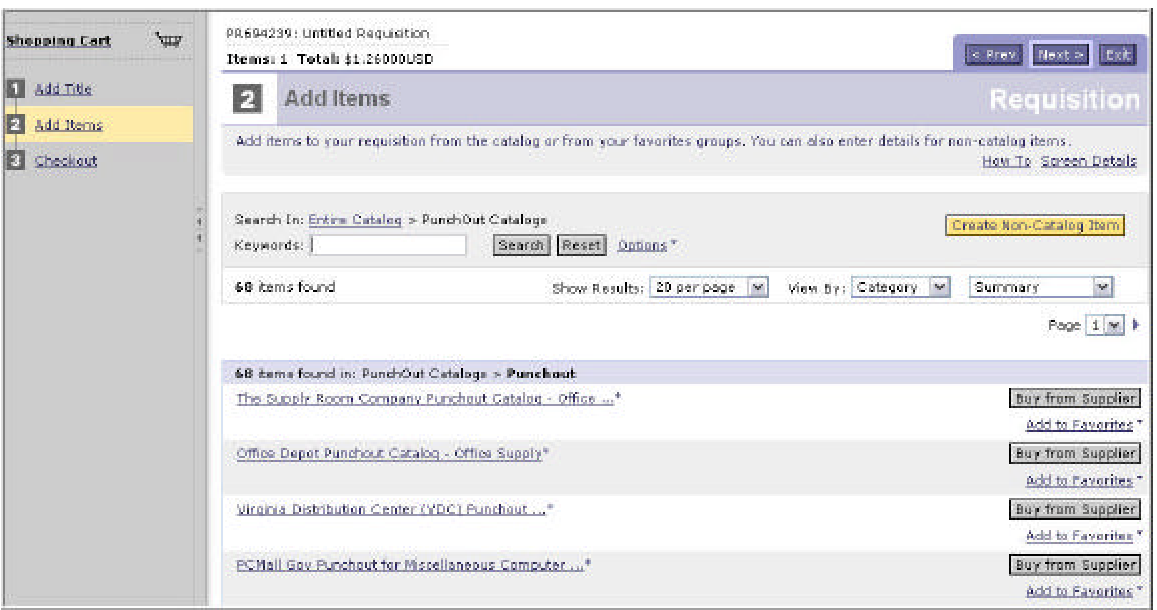
PUNCHOUT CATALOGS

A PunchOut catalog stores the full details about each item on the vendor's own website. The eMall provides catalog links to get to the PunchOut Catalog.

PunchOut catalogs can be found at the *PunchOut Catalog* link on the **Add Items** page.



Find the vendor you want in the list, then select the **Buy from Supplier** button for the item to open another browser window for the supplier's/vendor's website.



Once you arrive at the PunchOut catalog, you may search for items and add them to your shopping basket. Go through the checkout procedures at the PunchOut website to pull the selected line items into your eVA requisition.

Search Strategies

Initially there are millions of catalog items to search. Your search strategy depends on the kind of shopping you are doing.

If you are looking for a specific item, your best bet is to enter a contract number, part number, or vendor name to take you exactly to what you want.

If you are searching for items under state contract, if you know the contract number, enter it in the keywords filed. Otherwise, select the Contract Type search field and select the contract type.

If you are shopping for a best buy with only general requirements to meet, you will want to *narrow* your search to items that most closely identify what you want, probably by using commodity categories or general keywords. If too many items display, you can narrow your search even further by selecting additional search fields.

Viewing the Search Results

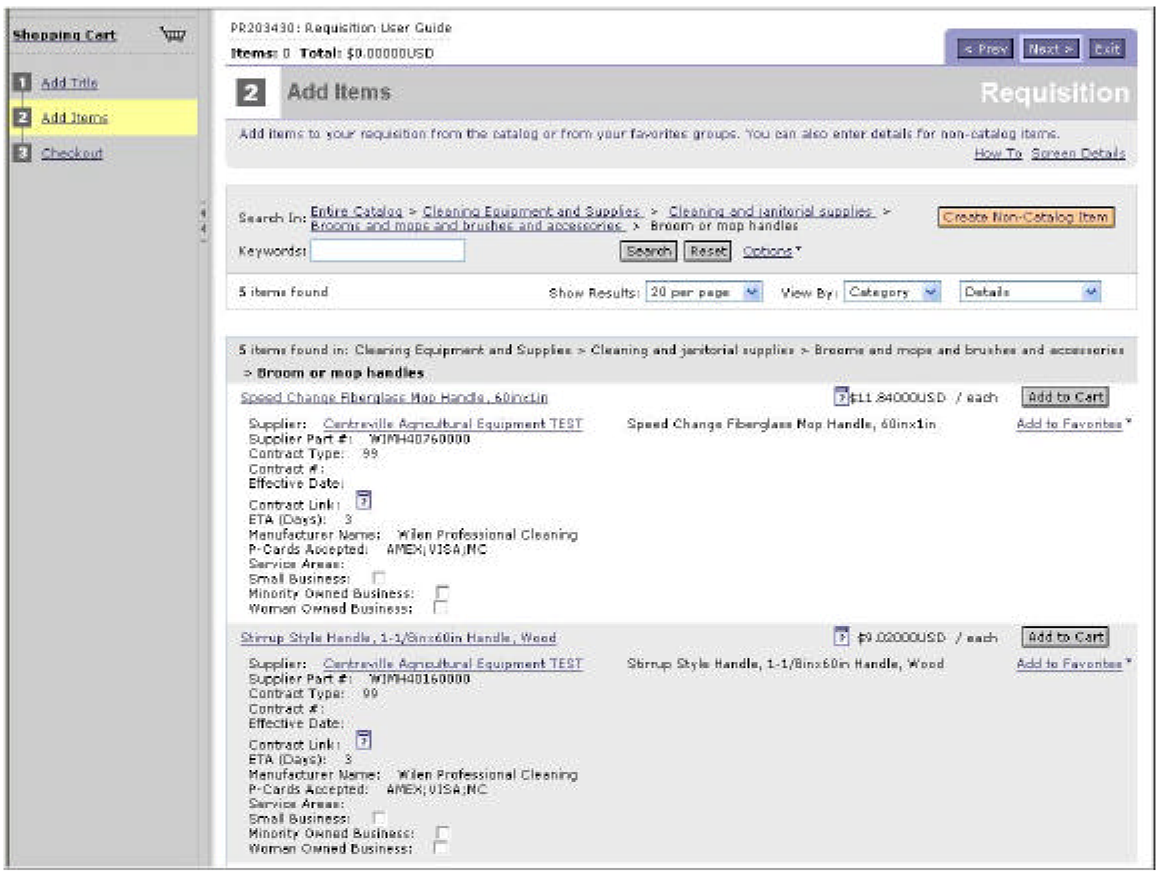
A keyword search will return all items with the specified keywords in their catalog entry. Once you drill down to a specific category, the items will display an item description, vendor name, and part number, etc.

VIEWING ITEM DETAILS

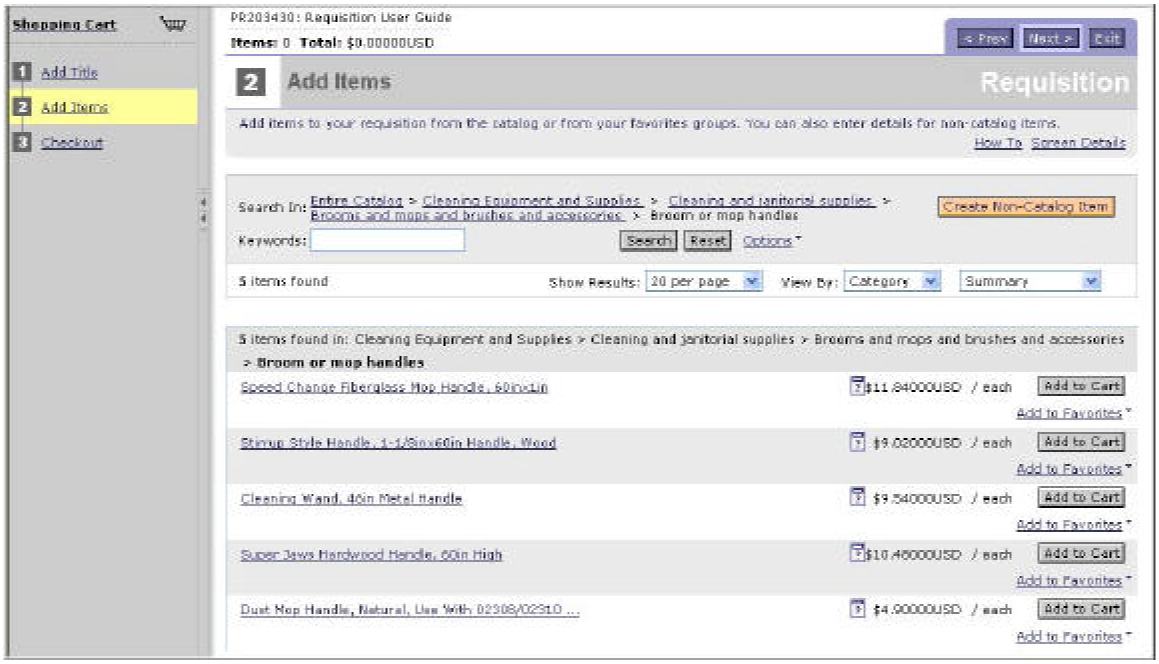
There are several ways to view search results:

- Summary
- Details
- Summary (multi)
- Details (multi)

The *Details* view shows additional details for each item, including Supplier/Vendor, Purchase Cards accepted, SWAM designations, and Contract Number information.

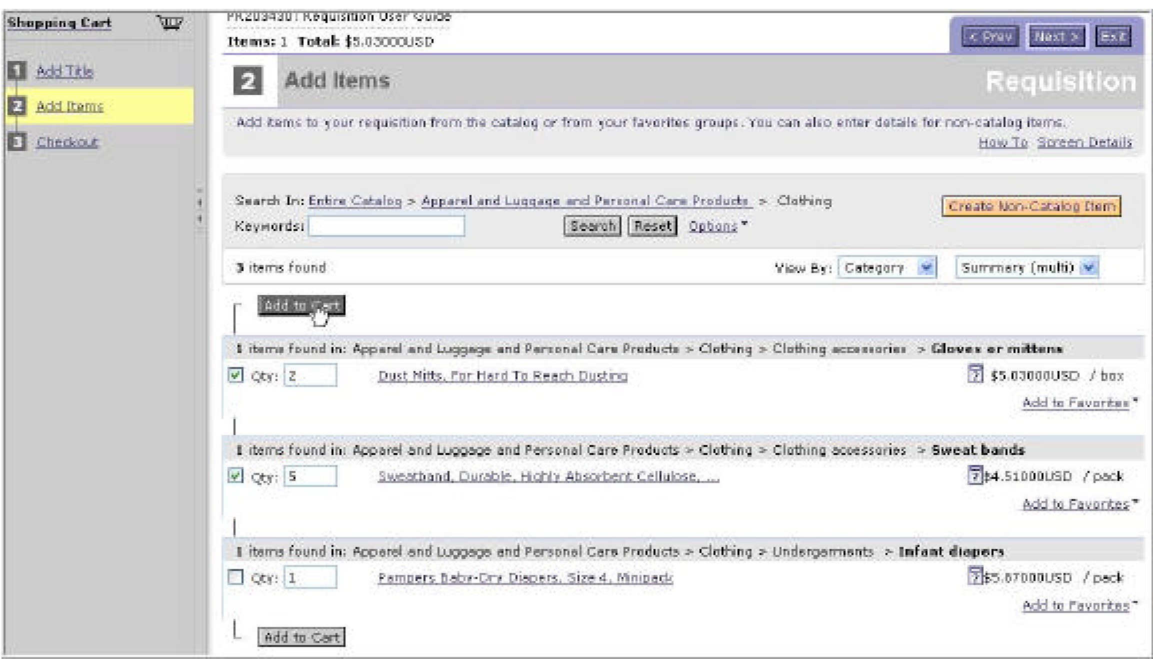


The Summary view shows only the description and price for each item.

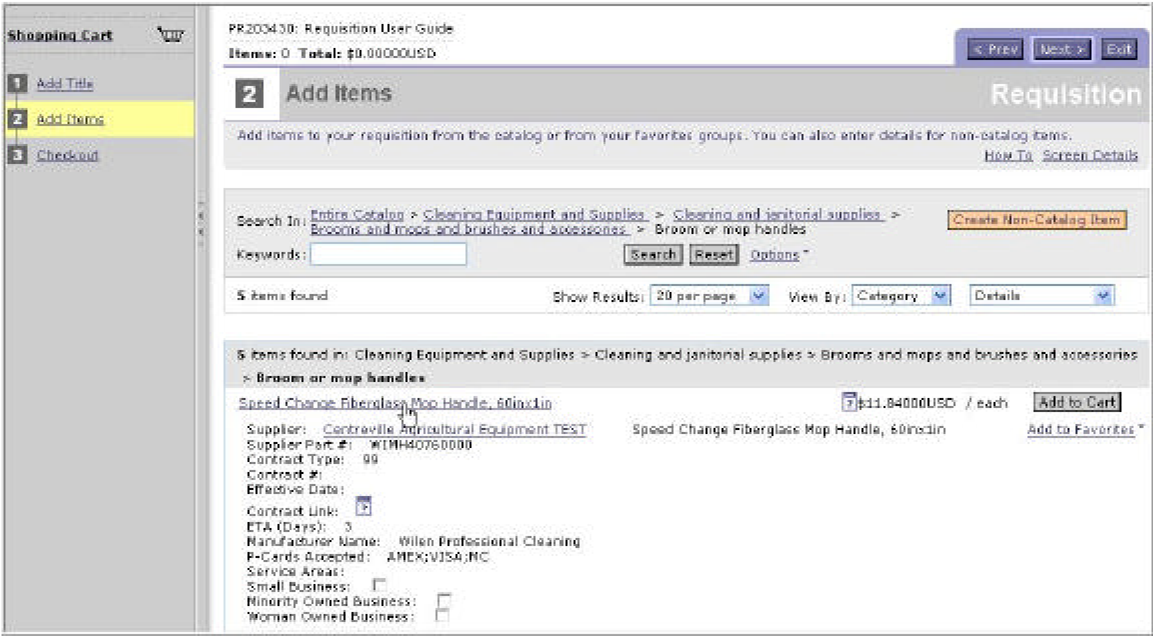


Select the item's description to open a screen with all item details provided by the vendor.

The *Summary (mutli)* and *Detail (multi)* views display the same information as the Summary and Detail views, with the additional feature of a Quantity field to the left of the item description. You can enter a quantity for one or more items, select the checkbox next to the items, then select the **Add to Cart** button.

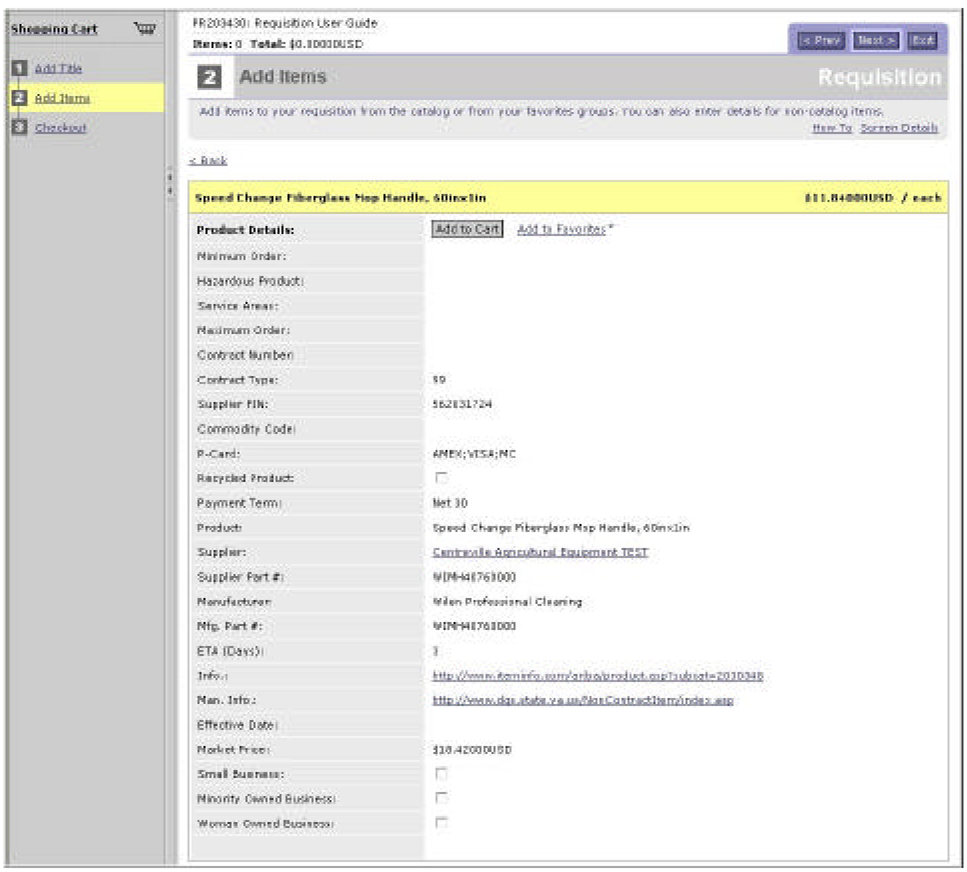


Select the item description to see the details provided by the vendor.



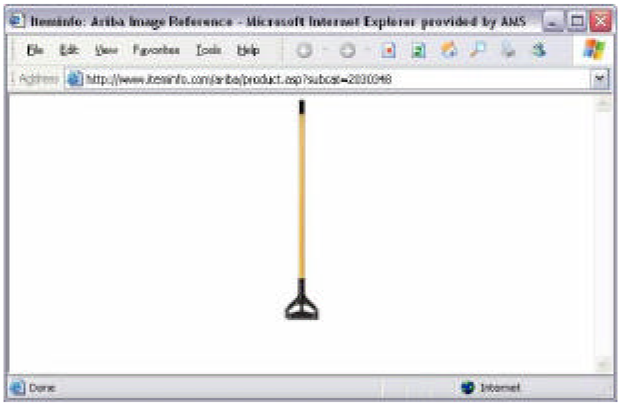
If you select the PRODUCT description, as shown on the previous page, details about the product appear on a new screen.

Select the **Back** link to return to your catalog search results.



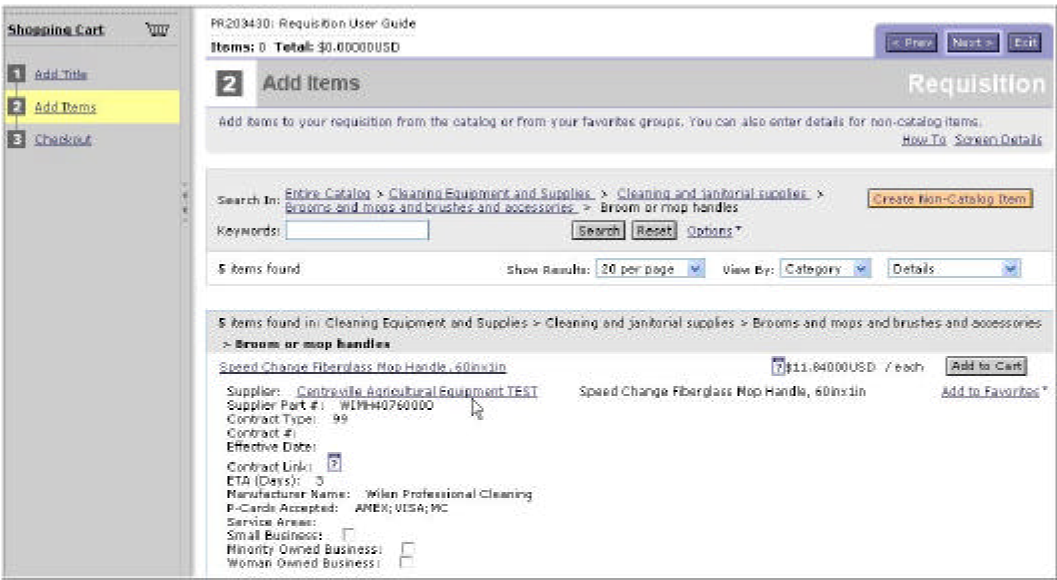
Webinfo Icon

Some vendors may provide more information about an item or a picture of it through a link to another website. Select the webinfo icon (?) next to the price to go to the website link provided by the vendor. You may close the new window at any time without closing the eMall window and ending your eVA session.

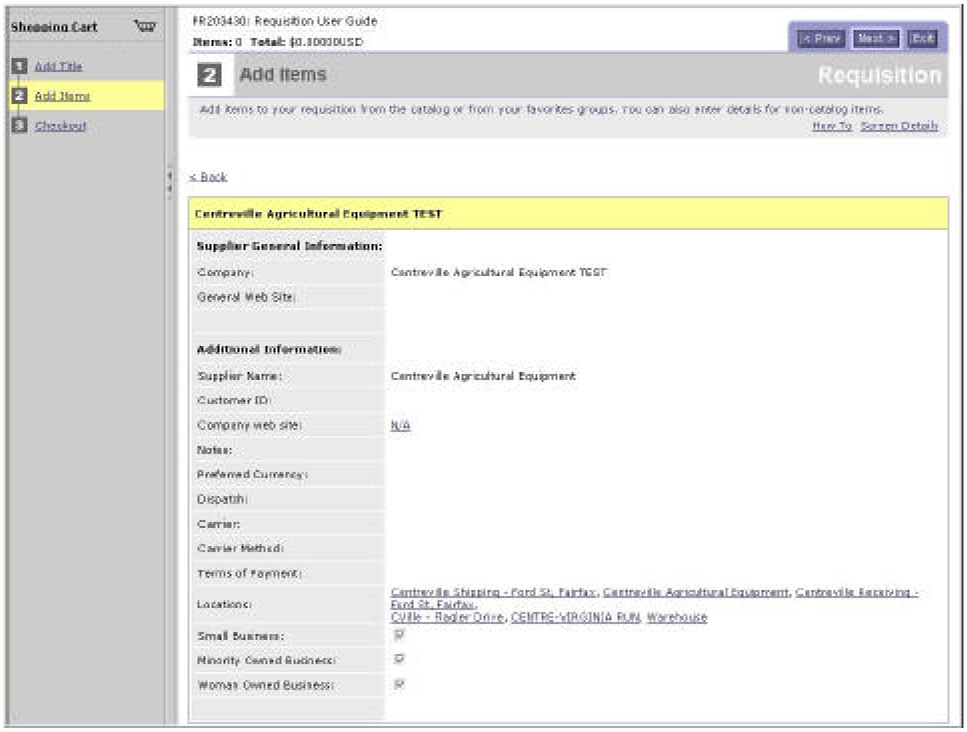


VIEWING SUPPLIER/VENDOR DETAILS

Each line item has a link for the vendor that provided the catalog item.



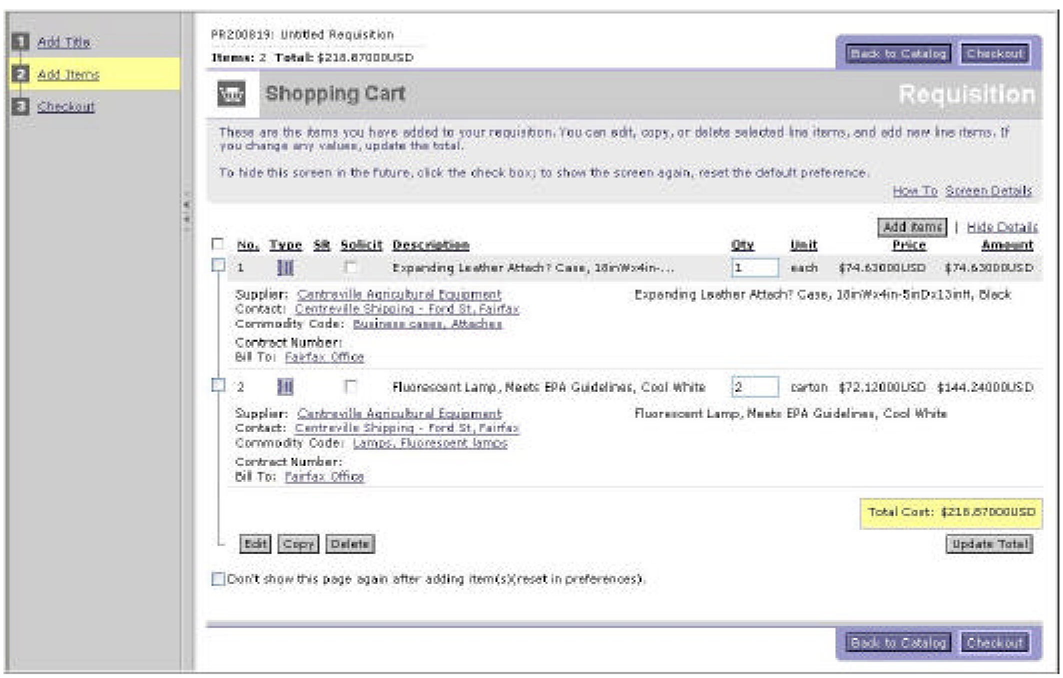
Select the Vendor name to view additional details.



Select the **< Back** link to return to the Item Summary.

Adding Items from Catalogs

Each time you identify an item you need, select the **Add to Cart** button to add the items automatically to your requisition. If you select a PunchOut catalog (with the **Buy from Supplier** button), any items purchased at the PunchOut site will automatically populate your requisition once you check out of the vendor's website.



> *Although it may appear that you are creating your order at the vendor's website, the vendor will not receive an order until you complete and submit the eVA eMall requisition and get necessary approvals.*

Each time you add an item to your cart, the Shopping Cart screen appears. This screen gives a summary of the items you have selected.

In this screen you can:

- Copy items that you have already selected, delete items, or edit items
- Select the **Add Items** button or the **Back to Catalog** button to select more items
- Adjust the desired quantity; to see the new total, select **Update Total**
- Select **Checkout** when you have finished adding items to your requisition

If you do not wish to see the Shopping Cart each time you select a new item, you may select the *Don't show this page again after adding item(s)(reset in preferences)*

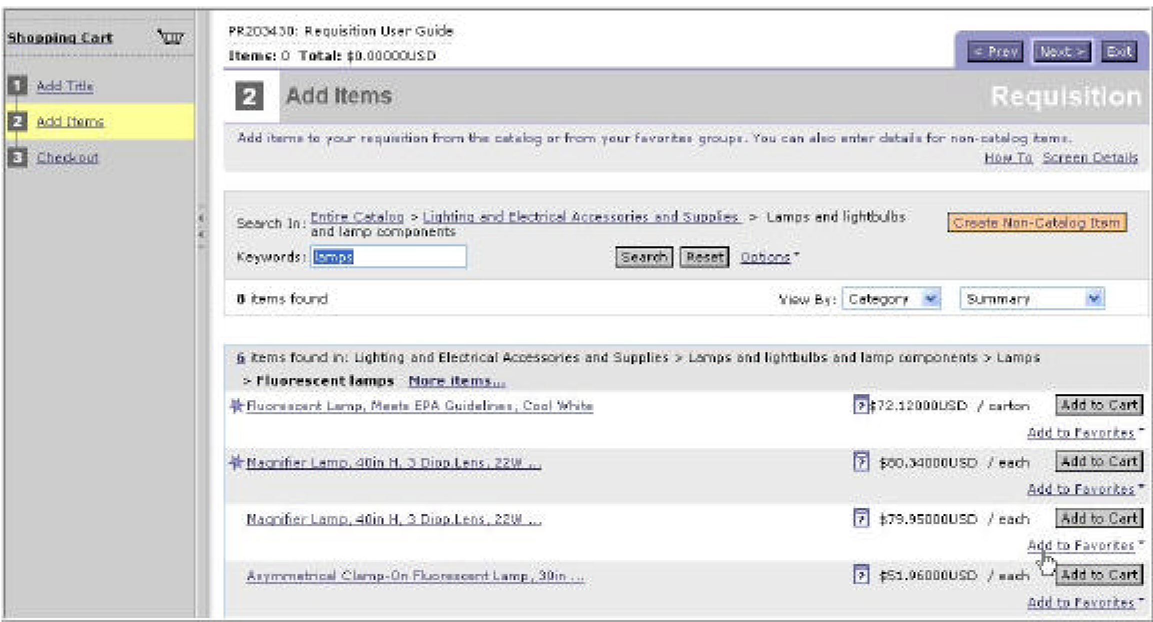
Favorite Items

If there are catalog items that you buy frequently, you can mark them as Favorites. You can then select items from your Favorites list quickly when you are ready to buy them again.

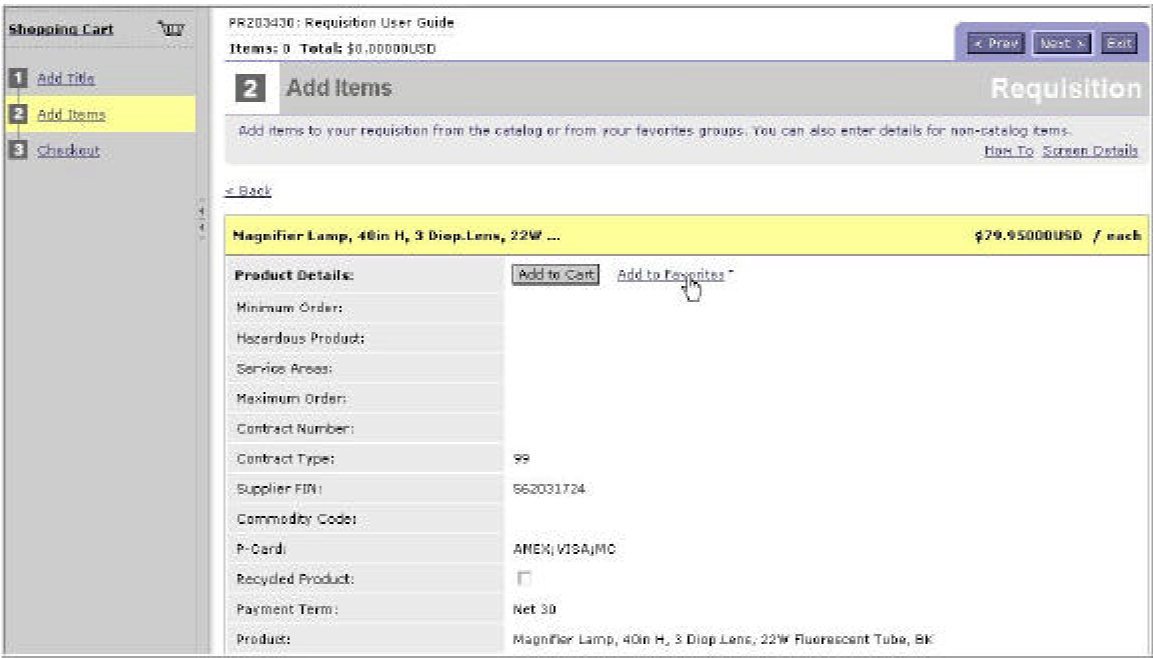
ADDING ITEMS TO FAVORITES

There are two places where you can add items to your Favorites list.

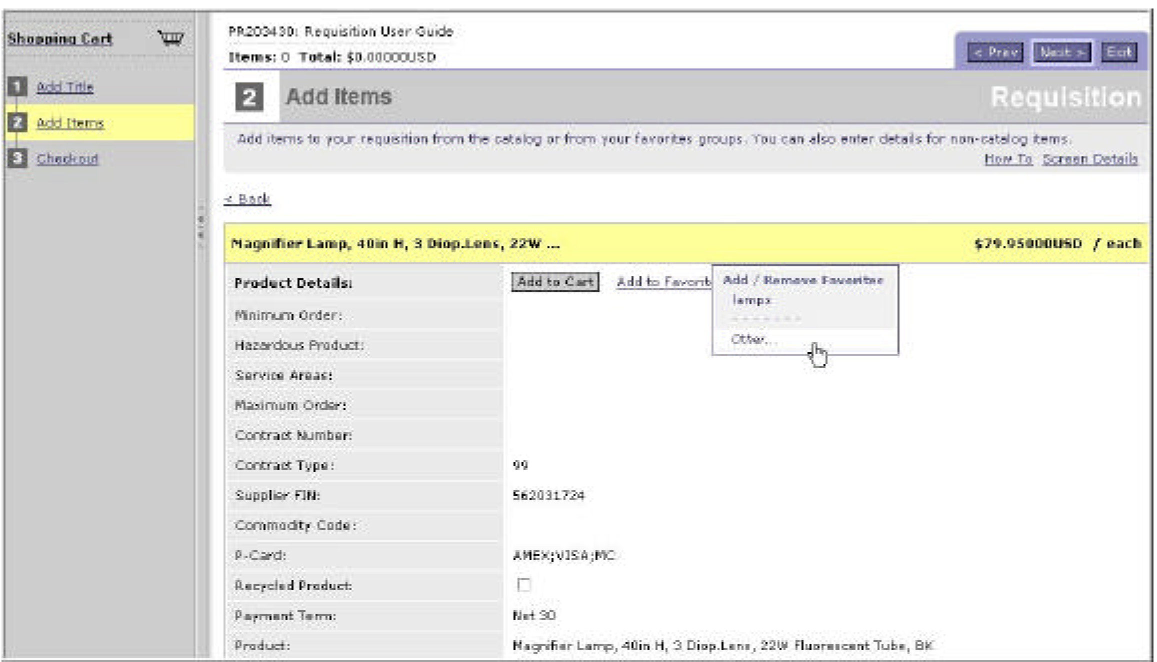
After you perform a search for items, you can select the **Add to Favorites** link for any of the resulting items.



You can also open a new screen by selecting the underlined product description. Select the Add to Favorites link from the item's Product Detail screen.



Selecting the link opens a list of your Favorite groups. Place the item in an existing Favorites group that you have already created, or create a new group by selecting *Other...*.

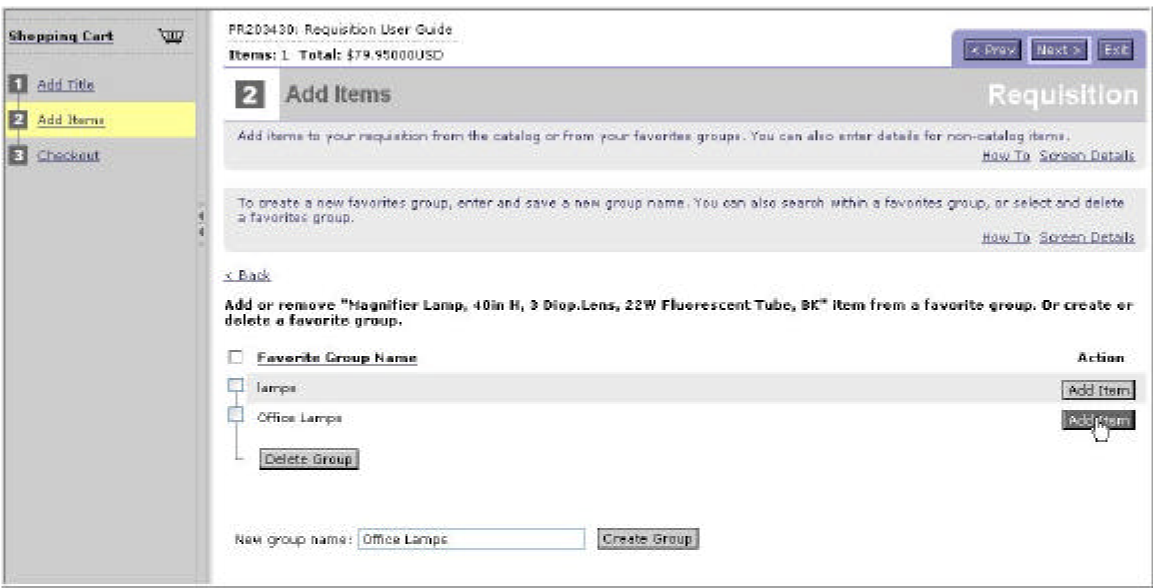


Creating a New Favorites Group

Select Other... from the Add / Remove Favorites drop-down list as shown above.

Enter a name for the new group, then select **Create Group**.

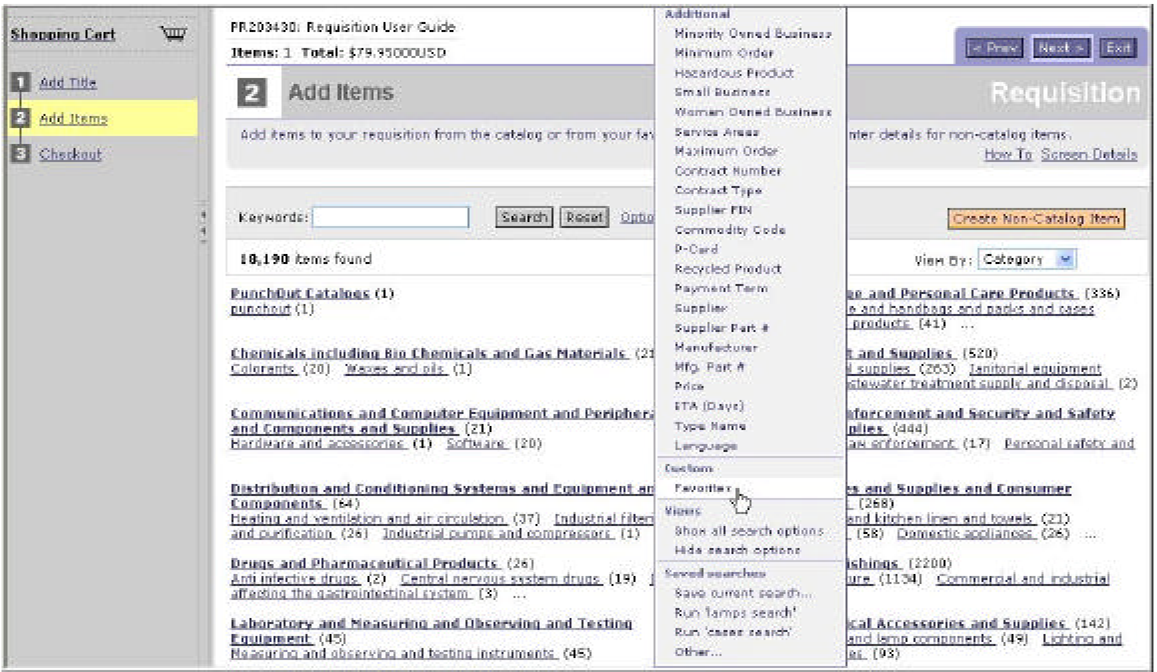
Select the **Add Item** button to add the item to the newly created Favorite Group.



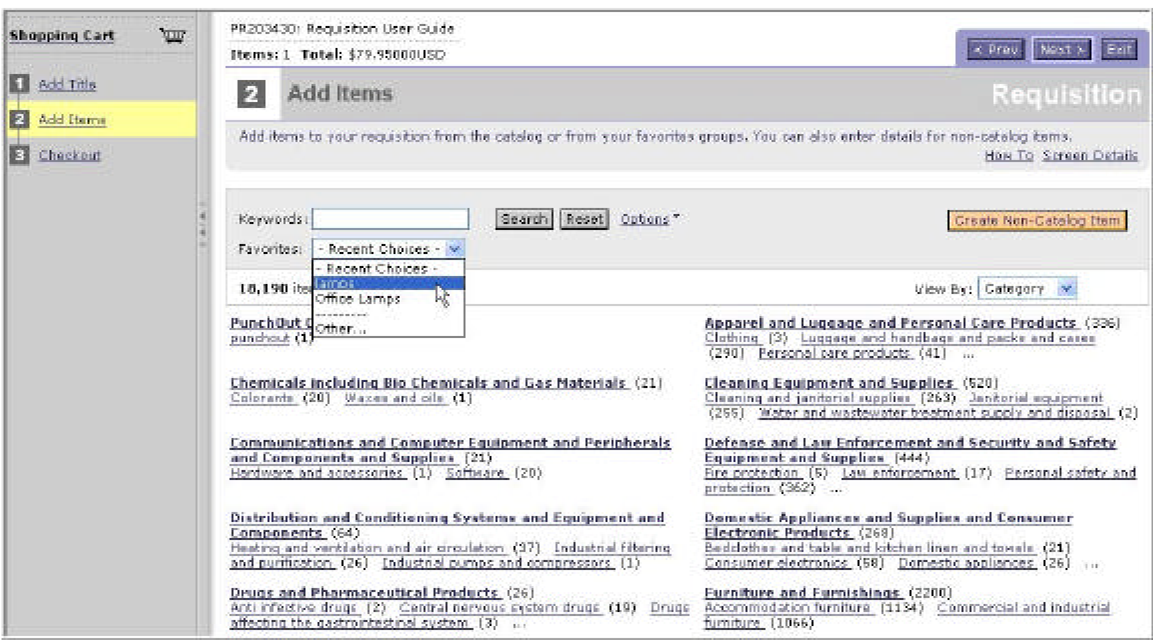
ADDING A FAVORITE ITEM TO YOUR REQUISITION

If you have saved Favorite items in various groups, you can add them to your requisition from the Favorites list on the Options menu.

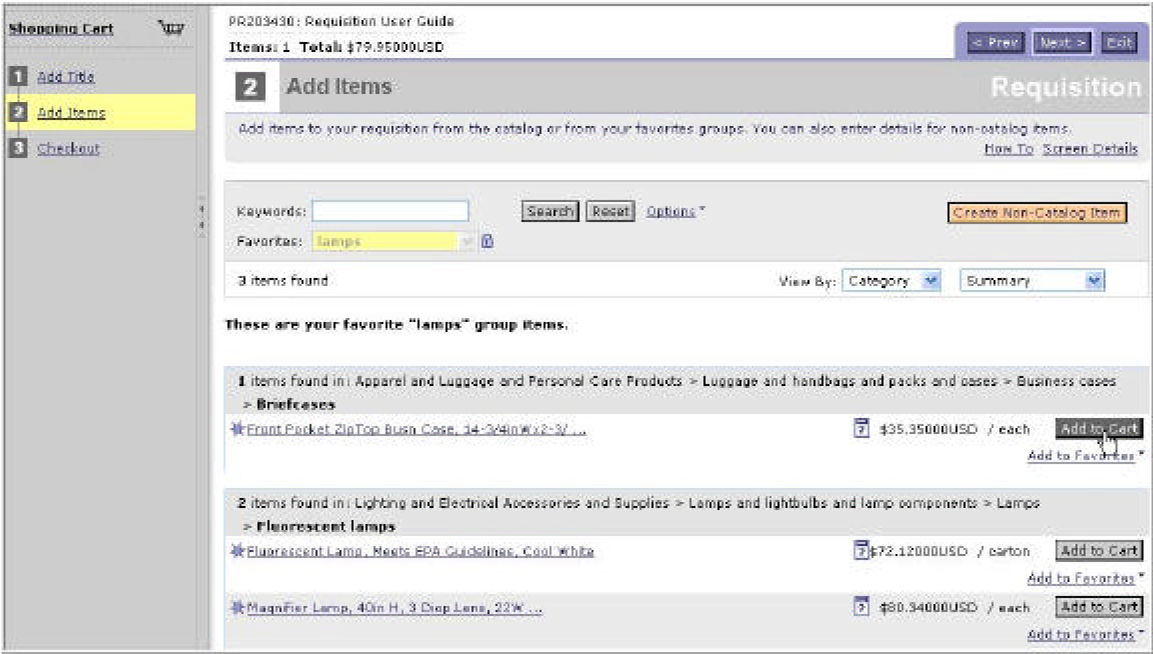
Select *Favorites* from the Options menu to add the Favorites list to your Search fields at the Add Items screen.



The Favorites drop-down list shows your Favorite groups. Select the group that contains the Favorite items you wish to purchase.



The Favorite group displays each item you have added to the group and the item is denoted by a STAR in front of it. To add a favorite item to your requisition, select the **Add to Cart** button**.**

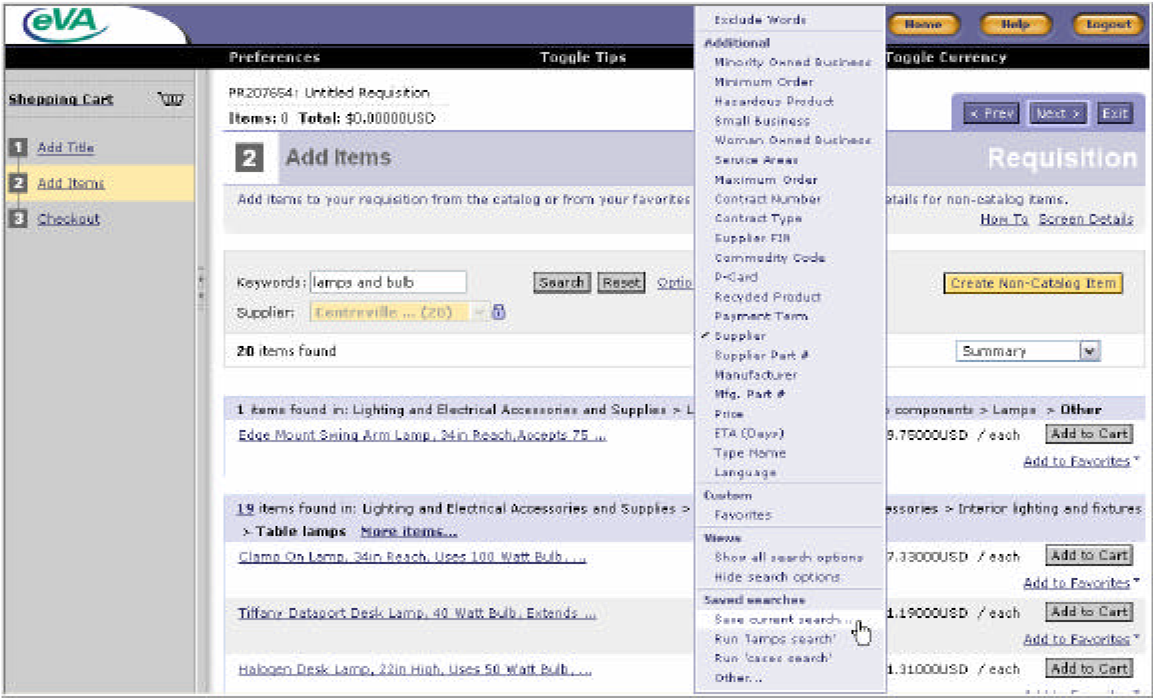


The Favorites field was locked when you selected the favorite group. If you want to look in a different Favorite group, or return to another search method, select the lock icon or the **Reset** button to remove your selected Favorites group from your search criteria.

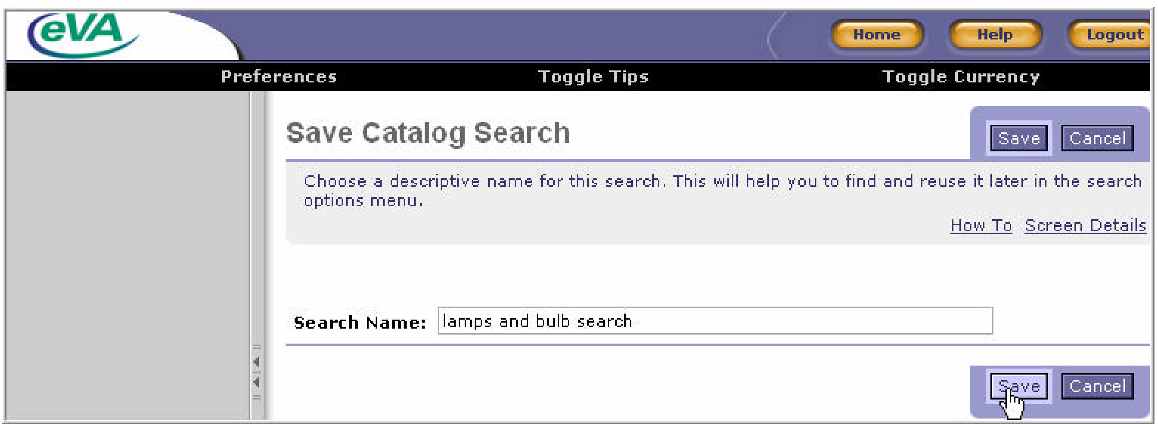
Saved Catalog Searches

If there is a catalog search that you perform often, it is a good idea to save it. To save a catalog search, first enter your criteria. In the example below, the user needs to purchase lamps and bulbs from Centreville Agricultural Equipment. He enters "lamps and bulb" in the Keywords search engine and selects the vendor from the supplier drop down menu.

Once the result displays, select the **Options** drop-down menu and select the **Save current search…** link.

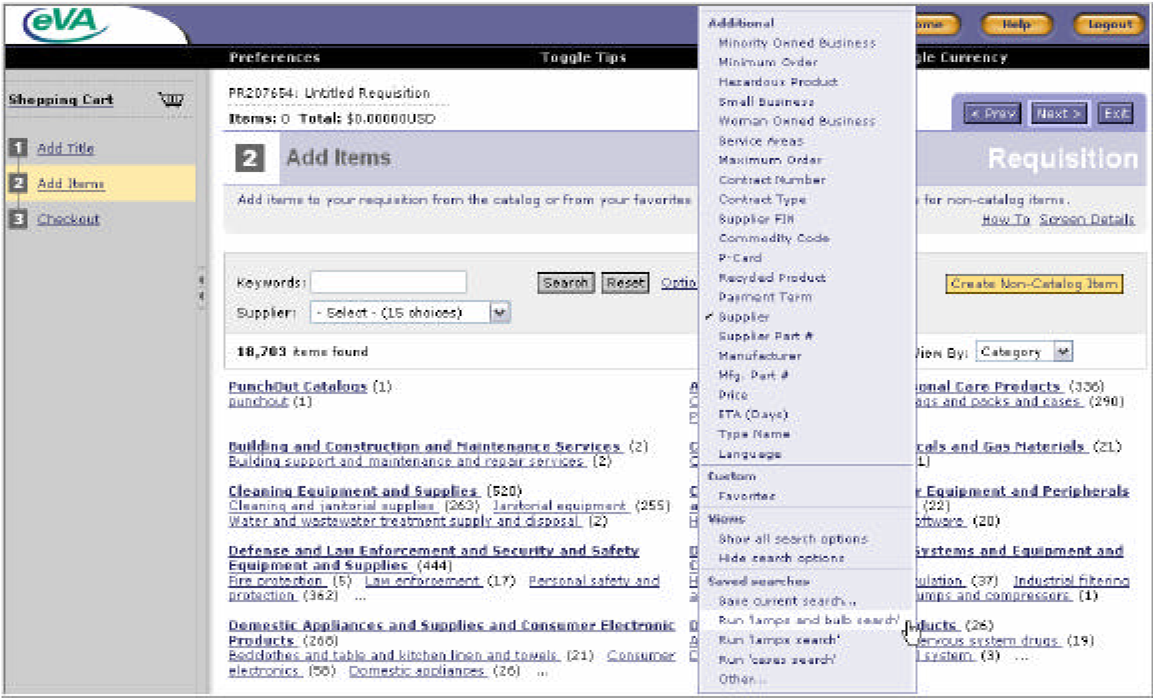


Give your search a unique name that is easy to distinguish from other names then select **Save**.

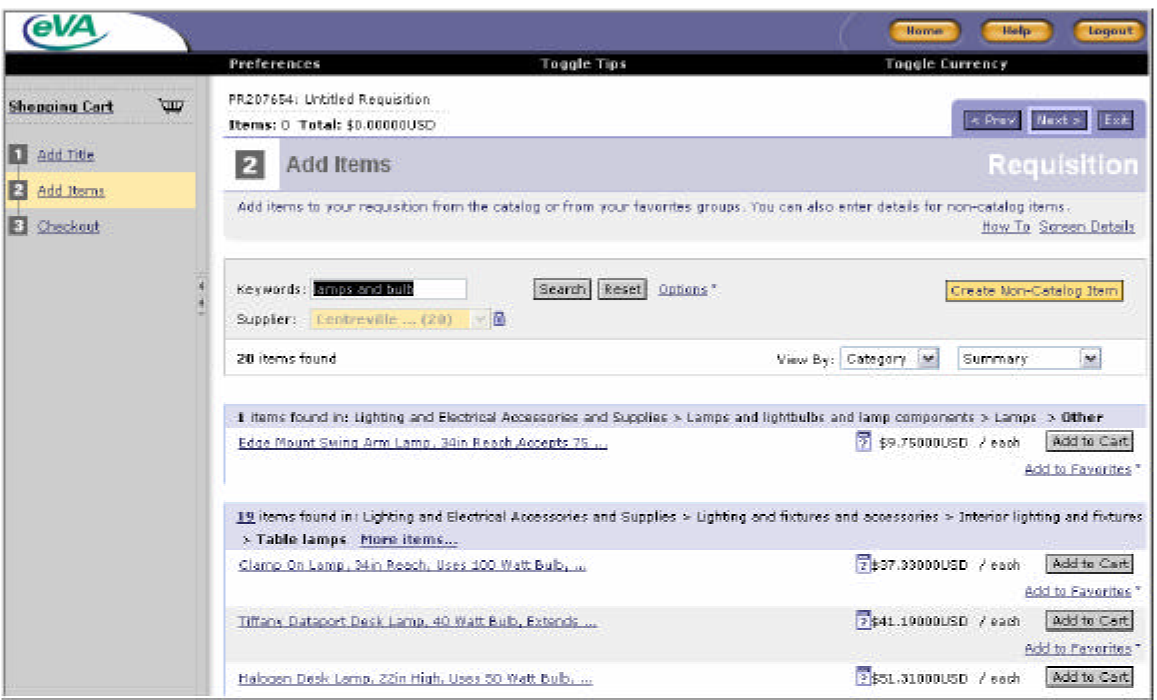


ADDING ITEMS FROM SAVED SEARCHES

Once the catalog search is saved, you may access it by selecting the **Options** drop-down menu. Select the saved catalog search you wish to run under the Saved Searches section.



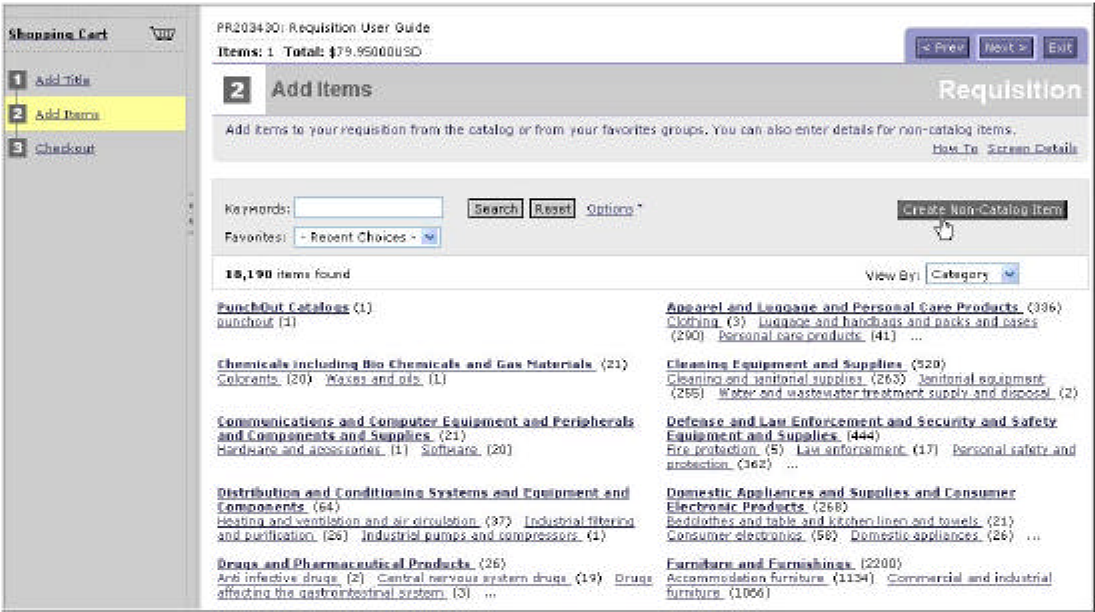
This will generate a list of items meeting the query's search criteria.



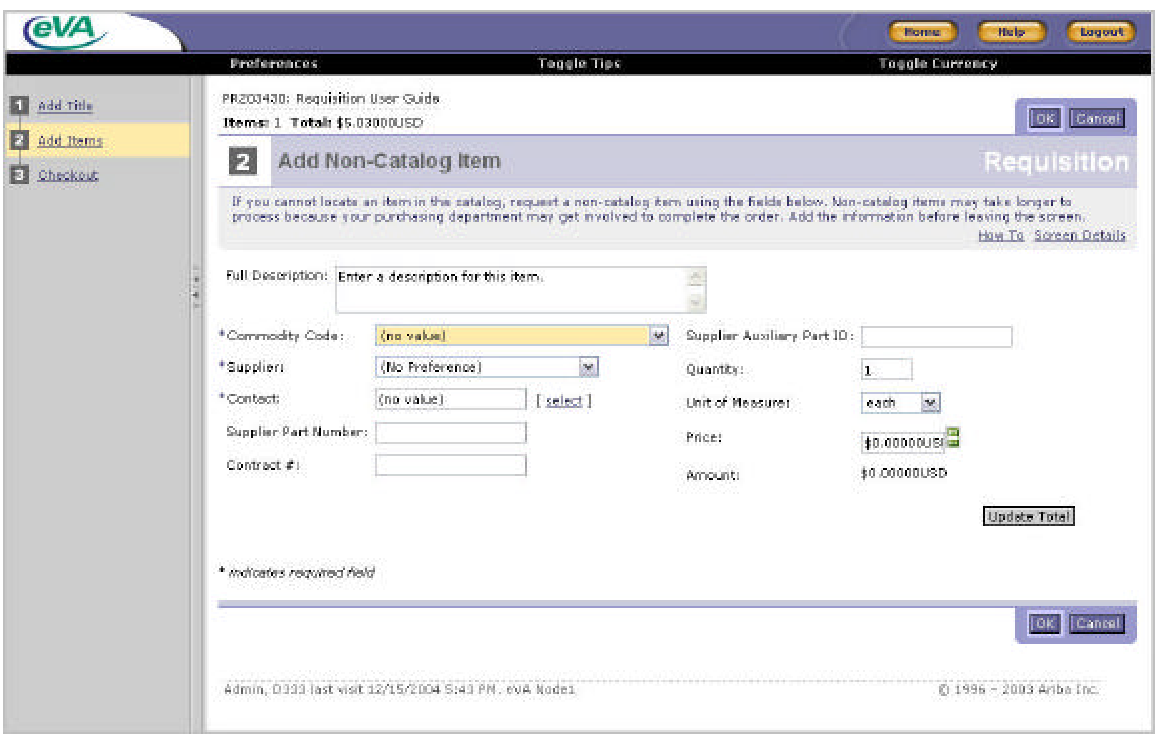
Once you run the search, you may add items by selecting the **Add to Cart** button. The system will prompt you to create a requisition when an item is selected.

Adding Non-Catalog Items

If your desired item is not found in a catalog, you may enter a non-catalog request for the item. To create a non-catalog item, select the **Create Non-Catalog Item** button on the Add Items screen.



Enter the details for the item you are requesting. Required fields are described below.



- Remove the text in the Full Description box and enter a detailed description for the product you are purchasing.
- Select a commodity description for your product from the Commodity Code drop-down list. If it is not on the list, select *Other...* In the Commodity Code screen that opens, enter a description for your commodity and select **Search**. When the appropriate commodity appears in the list, click on the **Select** button to bring your choice back to the above screen.
- Select *Other...* from the Supplier drop-down list unless your vendor is already there. Follow the instructions for Selecting a Supplier below.
- In the Unit of Measure field, you have the same option to select or search for a different value just as you do on the other fields where there is a drop-down list at the end of the field.

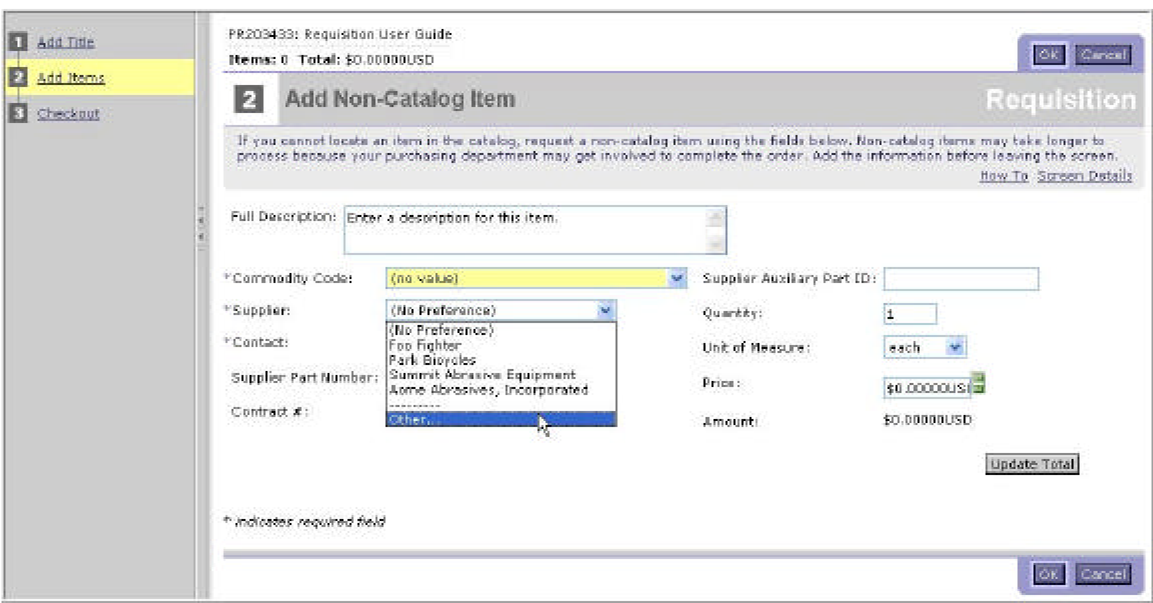
> *Be sure to enter the proper Unit of Measure so that receiving records and/or invoicing can be done against your order. For example, if you are purchasing a 12 month service contract, select "month" as the UOM and enter "12" as the quantity.*

- Enter a unit price for your product/service in the Price field.
- Complete the remaining fields. If you are purchasing a product under state contract, it is important to enter the contract number in the Contract # field. Although the remaining fields are optional, please enter the information as accurately as possible. Most users do not use the Supplier Auxiliary Part ID field.

Once you have entered the details for your non-catalog item, select **OK** to add this item to your requisition. You will return to your Shopping Cart, unless you have chosen the option not to return to the Shopping Cart after each item entry.

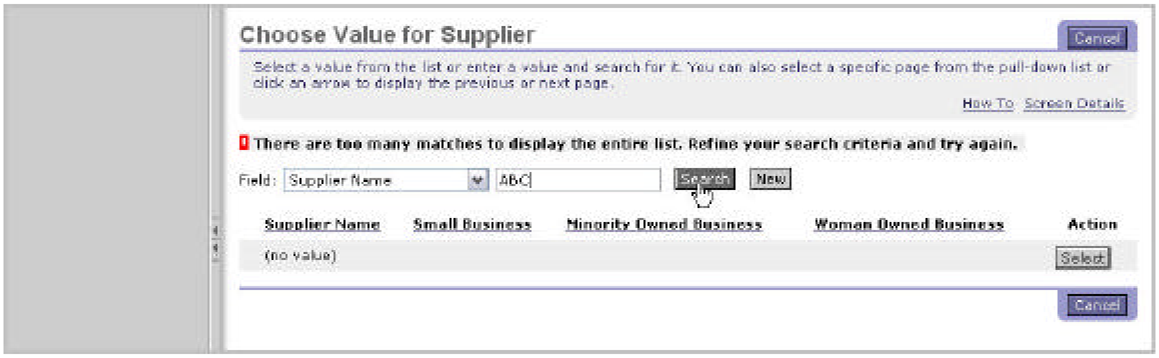
Selecting a Supplier

Your recently-selected vendors will appear in the drop-down list in the Supplier field. Use the *Other* option to conduct a search for a vendor that is not displayed on the drop-down list.



The Choose Value for Supplier window appears.

To find a vendor, enter a portion of the Vendor Name in the search field, then select **Search**.



When you find the vendor you want, select the applicable **Select** button. This name will appear in the supplier field on your Non-Catalog Item.

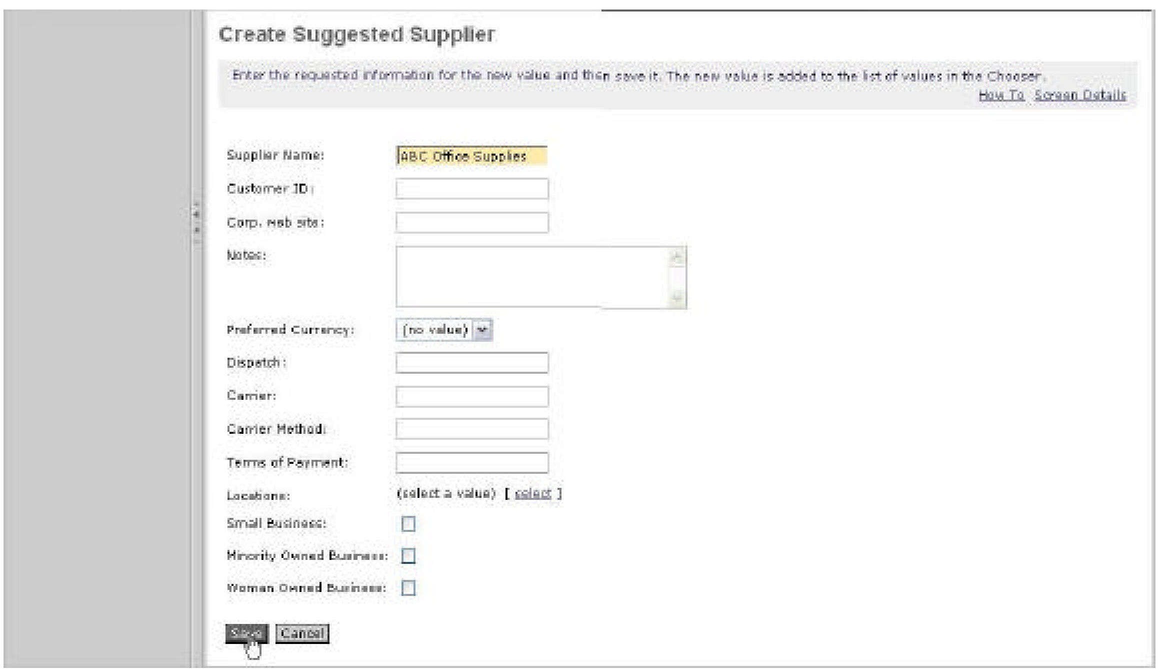
*IMPORTANT! To view the ordering location(s) available for the selected vendor, choose the **[select]** link next to the Contact field on the Add Non-Catalog Item screen.*

Adding a New Supplier/Vendor

If the vendor you want is not registered in eVA, you may add a new vendor for this requisition only by selecting **New** from the Choose Value for Supplier screen.

> *CAUTION! Your agency/organization may be liable for an additional transaction fee if you use a non-registered vendor for your eVA purchase orders.*

The Create Suggested Supplier screen opens for entering the new vendor information.



The Supplier Name field is highlighted to show that a value must be added. Enter the Supplier's/Vendor's Legal Name and select **Save**.

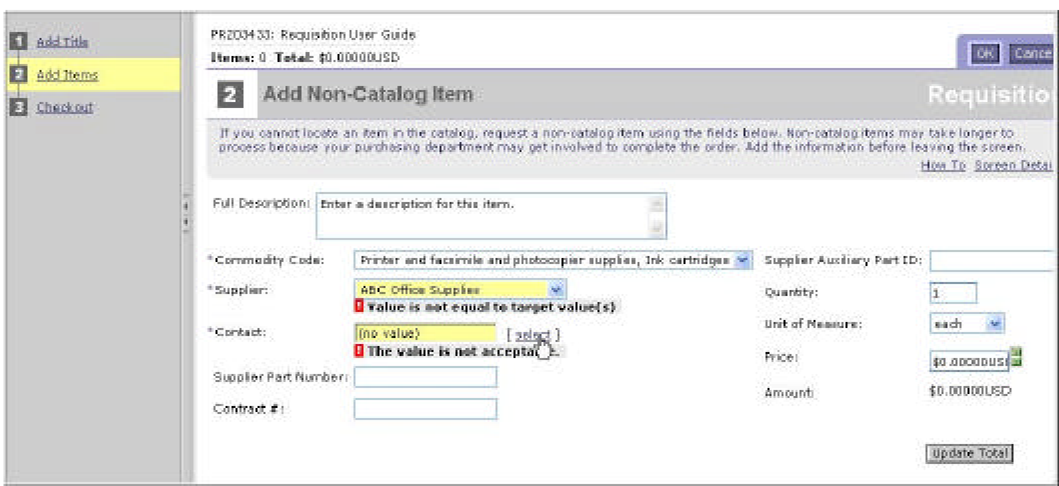
After saving the new information, you will return to the Choose Value for Supplier screen where you will see the name of the vendor you entered.

Select the **Select** button for your new vendor.

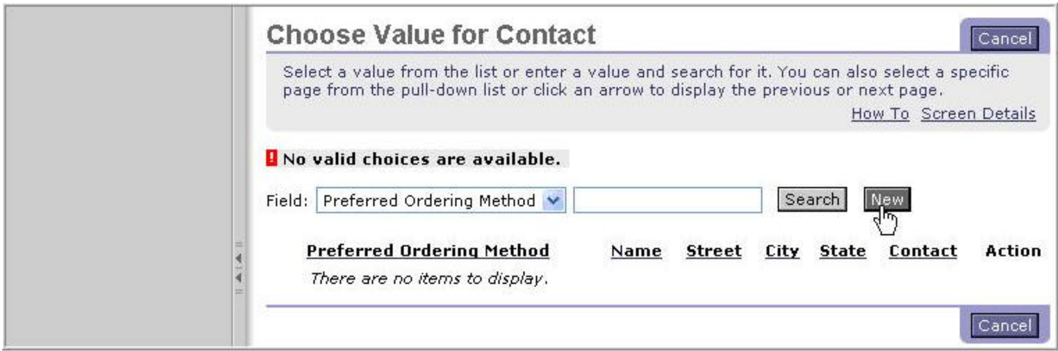
You will return to the Add Items step with the new name in the Supplier Name field. You will now need to add an Ordering location for the Vendor.

Adding a Contact for the New Supplier/Vendor

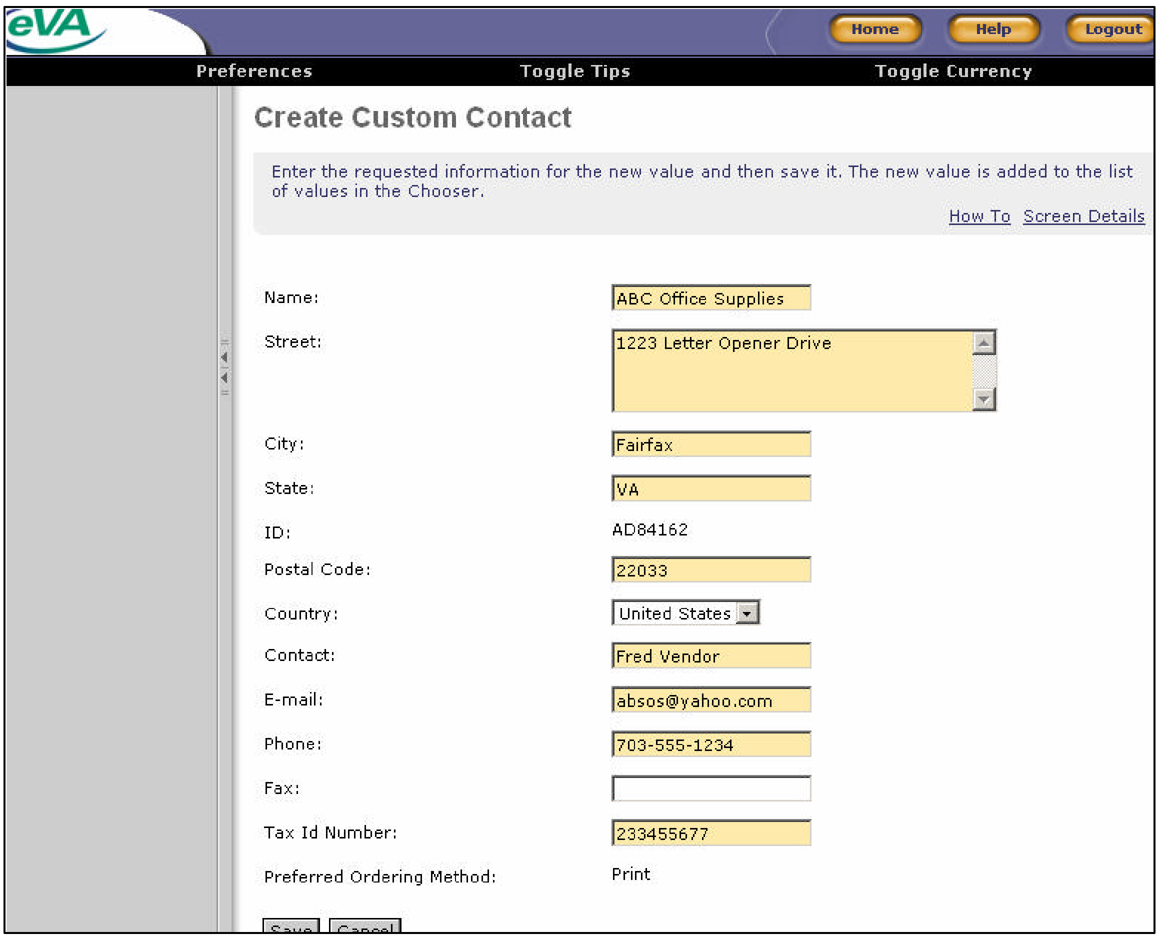
Choose the **[select]** link next to the Contact field.



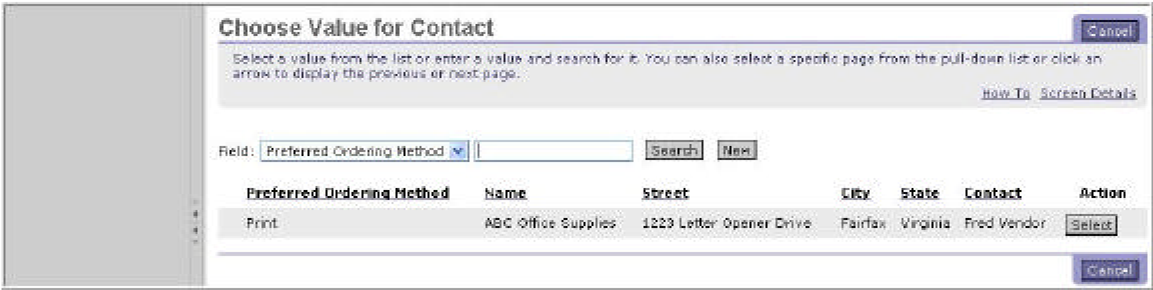
The Choose Value for Contact screen will open.



Select the **New** button to open the Create Custom Contact screen. Complete all highlighted fields. Your contact must have a value for either Email or Fax.

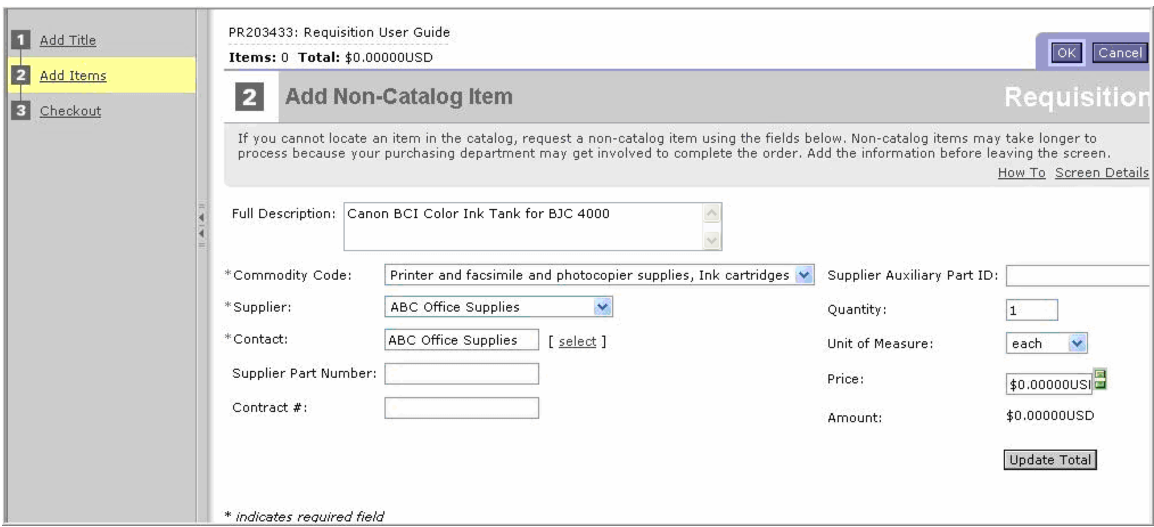


Select the **Save** button. You will return to the Choose Value for Contact screen, with the name of the new order location information listed.



When you enter new vendor information, the Preferred Ordering Method is set to "PRINT" meaning the vendor cannot receive the order electronically. After submitting this requisition, you will need to print and fax/mail all items on your order to this vendor.

Once you choose the **Select** button, you will return to the Non-Catalog Add Items screen and see the newly added vendor's location name in the Contact field.



Insert the quantity, unit of measure, and price for the item you wish to purchase and then select the **OK** button.

> *If you are purchasing a service, keep in mind how the service will be received and paid for when determining the quantity, unit of measure, and price. For example, you need to purchase a year of elevator maintenance service at the rate of $2,400 a year. If you will be paying for the service at the end of the contract, you would insert 1 as the quantity, year as the unit of measure, and $2,400 as the price. However, if you will be paying for the service in monthly installments, you need to put 12 as the quantity, month as the unit of measure, and $200 ($2,400 divided by 12 months) as the price.*

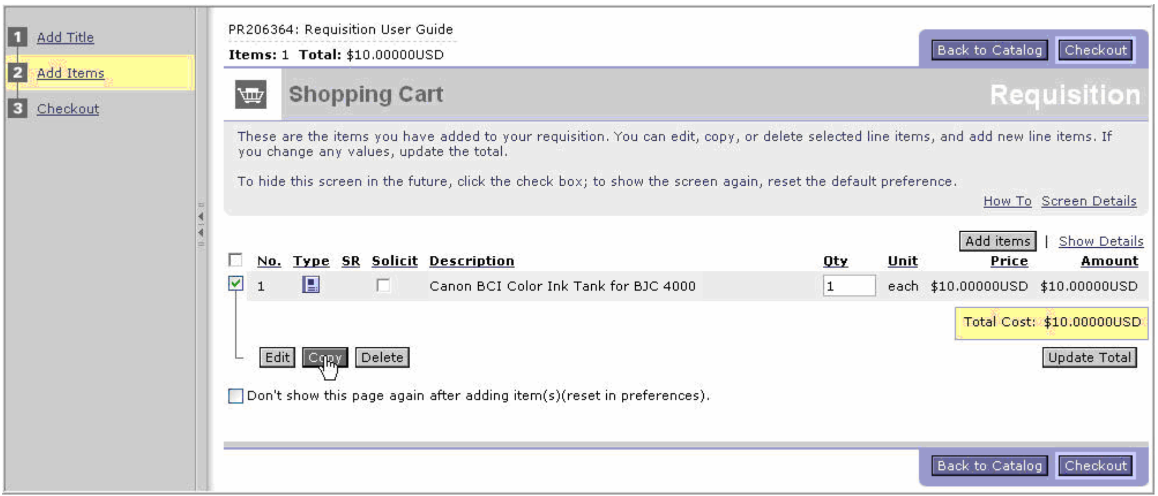
The Shopping Cart displays the non-catalog item you just added.

The new vendor you just added is for this requisition only. The eMall never retains this data. If you want to purchase from this vendor again, please contact the vendor and encourage them to register as an eVA vendor, explaining the many benefits for its use. Refer the vendor to the eVA Home Page to register.

If you need to order additional items from this vendor, copy* this item and make the necessary edits to the item description, price, etc., so you do not have to re-enter the vendor information.

*If you do not copy the item, the requisition will split the transaction into separate orders.

When you see this item in your Shopping Cart as shown below, select the checkbox next to the item and select **Copy**.



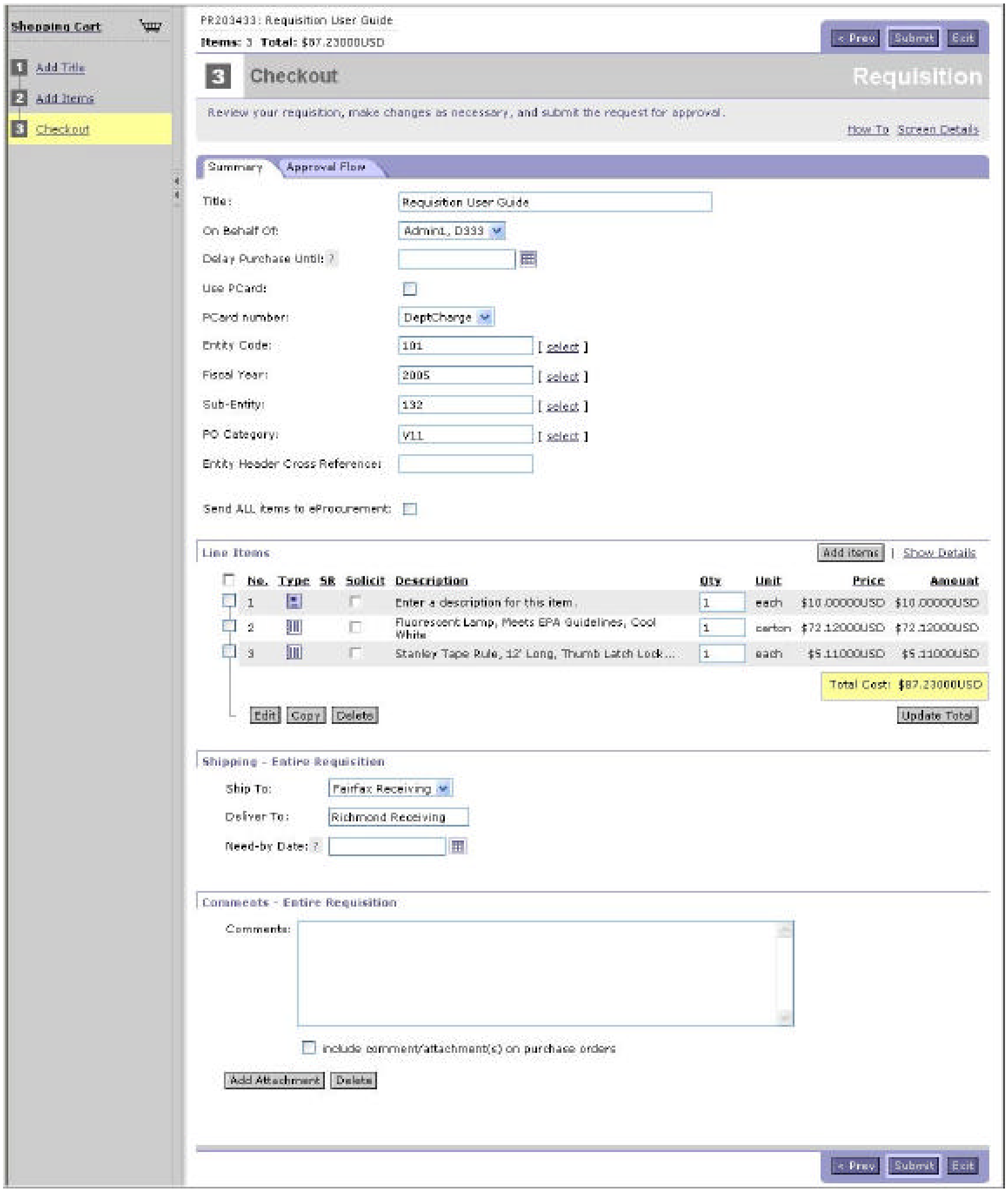
A copy of the non-catalog item is added to the Shopping Cart. Select the checkbox next to copied non-catalog item and select **Edit**.

Once you select the Edit button, you are taken to the Edit Line Item screen. To learn more about this screen, refer to the Edit Line Item Screen section of this guide. Edit the fields on the new line as needed (e.g., description, quantity, unit of measure, price, commodity code, etc.) leaving the Vendor information unchanged. Select **OK** when you are done.

From the Shopping Cart screen, select **Back to Catalog** to return to the previous **Add Items** screen to continue shopping, or select **Checkout** to complete the requisition and submit it for approval and ordering.

Step 3: Checkout

Once you have proceeded to the final step for Checkout, you may do additional required edits such as selecting multiple items to change accounting codes, shipping addresses, and adding comments or attachments.



Summary Tab

The Summary tab allows you to review your entire requisition on a single screen, or to make edits to multiple lines simultaneously. This is helpful for the final review of the document before you submit it.

The Summary tab has four sections:

- Title – Requisition
- Line Item
- Shipping – Entire Requisition
- Comments – Entire Requisition

Title – Requisition Section

The information in this section is taken from the Add Title screen. It has general information pertaining to the entire requisition. Review this section to ensure all the information is correct.

Line Item Section

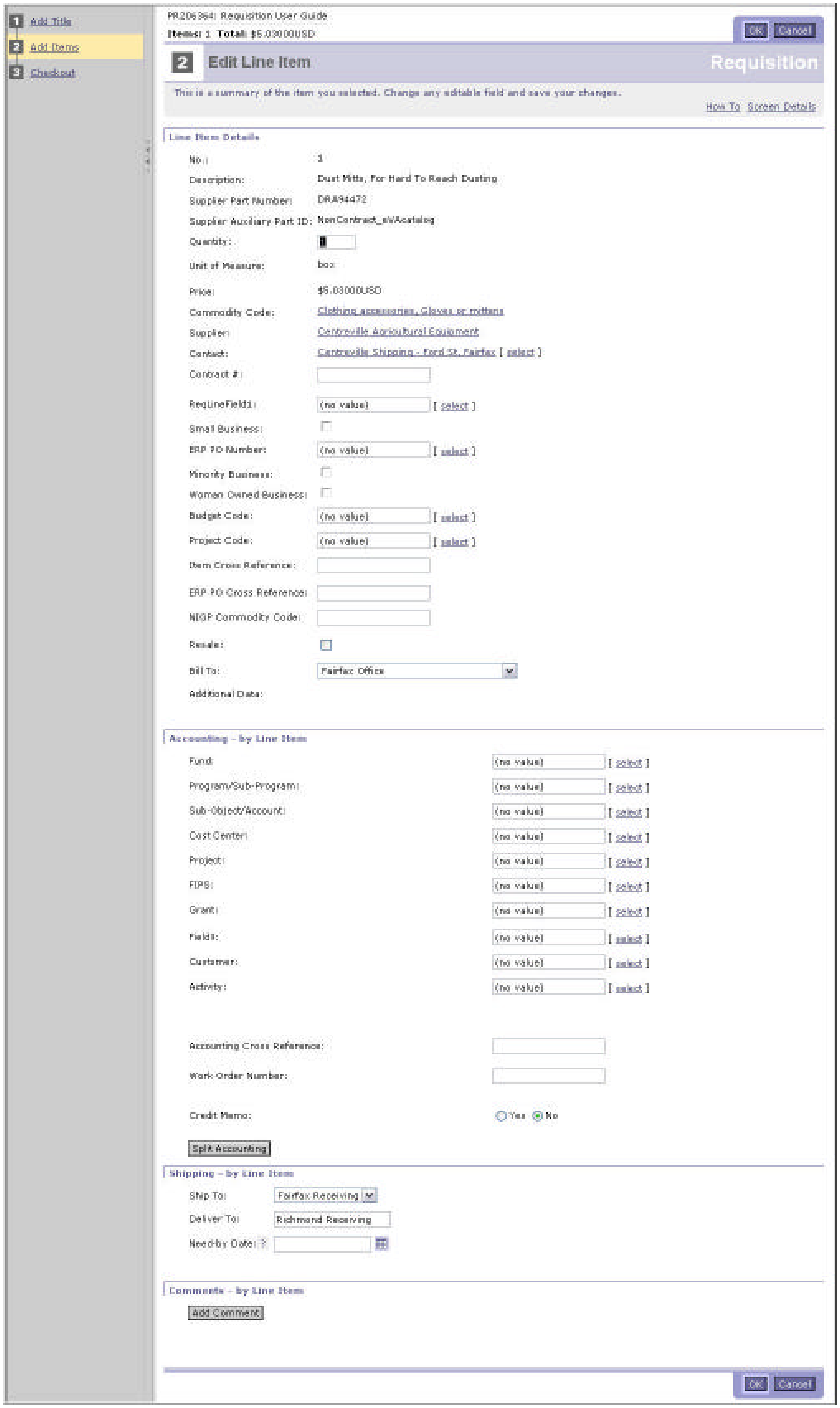
This is a list of all items you have selected for purchase. To see the details on each item, select the **Show Details** link above the Amount column.

Edit Line Item Screen

You can access other details of the line items from this section by clicking the checkbox next to the item and selecting the **Edit** button, you can view and/or change the following fields:

- Bill To address
- Accounting codes
- Contract number*
- NIGP code*
- Comments and attachments*
- Ship to address

*Not available for Mass Edit.



1 Add Title
2 Add Items
3 Checkout
PR206364: Requisition User Guide
Items: 1 Total: $5.03000USD
OK Cancel
2 Edit Line Item
Requisition
This is a summary of the item you selected. Change any editable field and save your changes.
How To Screen Details
Line Item Details
No.: 1
Description: Dust Mitts, For Hard To Reach Dusting
Supplier Part Number: DRA94472
Supplier Auxiliary Part ID: NonContract_eVAcatalog
Quantity:
Unit of Measure: box
Price: $5.03000USD
Commodity Code: Clothing accessories, Gloves or mittens
Supplier: Centreville Agricultural Equipment
Contact: Centreville Shipping - Ford St, Fairfax [select]
Contract #:
ReqLineField1: (no value) [select]
Small Business:
ERP PO Number: (no value) [select]
Minority Business:
Women Owned Business:
Budget Code: (no value) [select]
Project Code: (no value) [select]
Item Cross Reference:
ERP PO Cross Reference:
NIGP Commodity Code:
Resale:
Bill To: Fairfax Office
Additional Data:
Accounting - by Line Item
Fund: (no value) [select]
Program/Sub-Program: (no value) [select]
Sub-Object/Account: (no value) [select]
Cost Center: (no value) [select]
Project: (no value) [select]
FIPS: (no value) [select]
Grant: (no value) [select]
Field8: (no value) [select]
Customer: (no value) [select]
Activity: (no value) [select]
Accounting Cross Reference:
Work Order Number:
Credit Memo: Yes No
Split Accounting
Shipping - by Line Item
Ship To: Fairfax Receiving
Deliver To: Richmond Receiving
Need-by Date: ?
Comments - by Line Item
Add Comment
OK Cancel

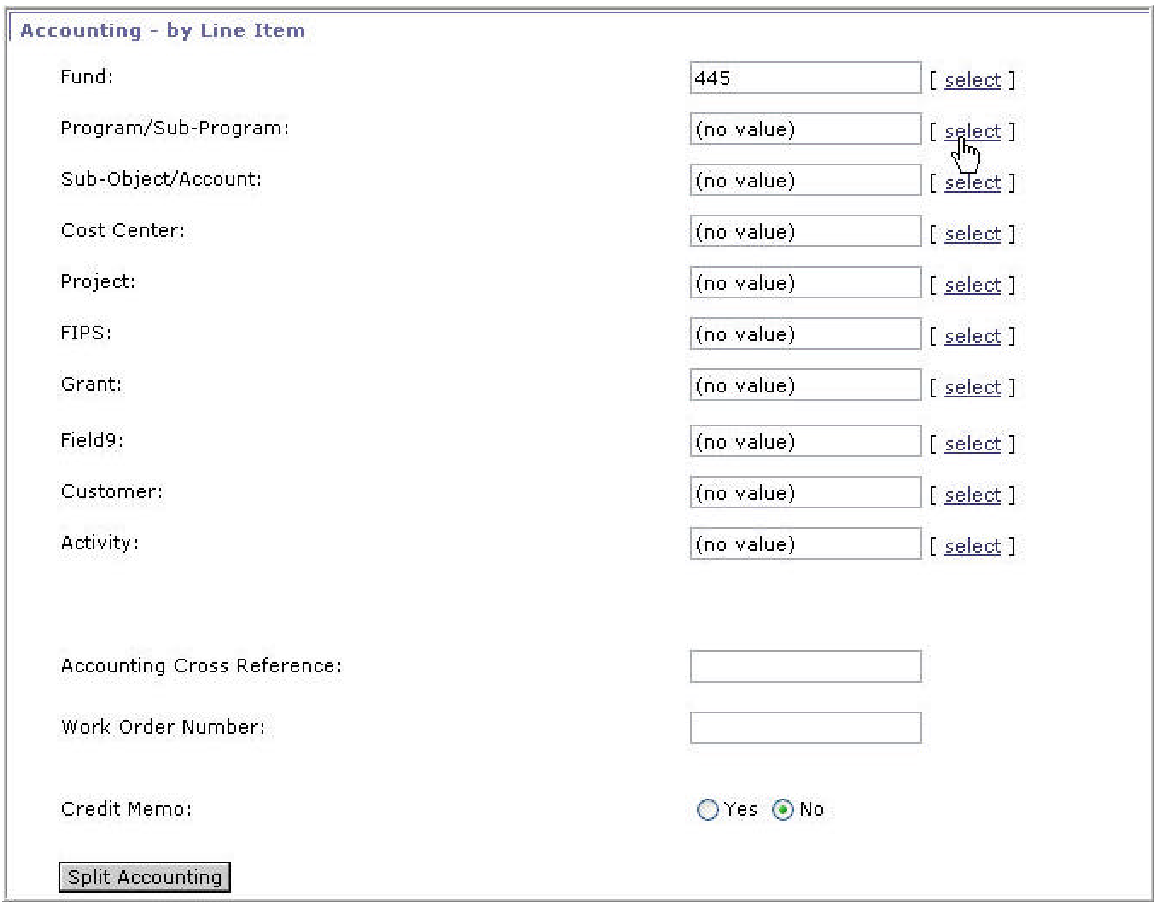
Accounting - by Line Item

The Accounting – by Line Item section displays the accounting values for each item on your requisition, and allows you to make changes as necessary. If your agency/entity has set up default values for your group profile, they will display.

You may edit the accounting for each line or split the accounting for an item.

There are two ways to edit a value:

1. If you know the valid value you want, enter it directly into the field.
2. If you would like to select a value from a list of valid values, select the **[select]** link next to the field you want to edit.



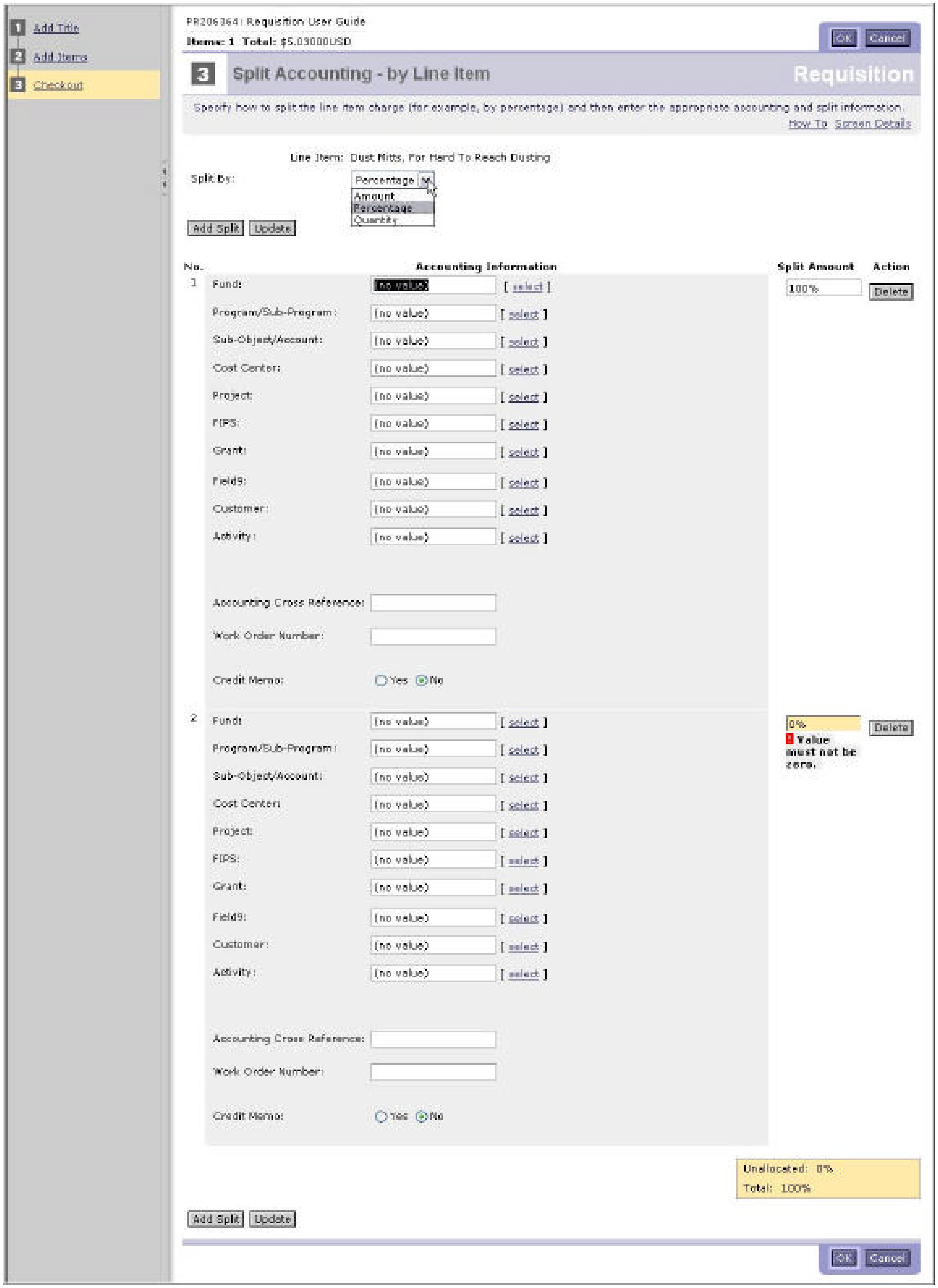
Split Accounting

To split the accounting for a line, select the **Split Accounting** button.

At the Split Accounting - by Line Item screen, select the method to divide line charges:

- Dollar Amount
- Percentage
- Quantity

Enter the desired accounting distribution for each split



At any point, you may select **Update** to calculate the allocation between accounting distributions.

The screen opens with two splits, but additional splits may be added to the first split by selecting the **Add Split** button.

eVA will keep track of your splits and the allocations to each to ensure that the funds are fully allocated, whether by quantity, price, or percentage.

When you have finished allocating funds between the splits, select **OK** to return to the Edit Items screen.

Shipping by Line Item

To apply shipping instructions by line item, refer to the Adding Shipping Instructions for Entire Requisition of this guide.

Adding Comments and Attachments to Line Item

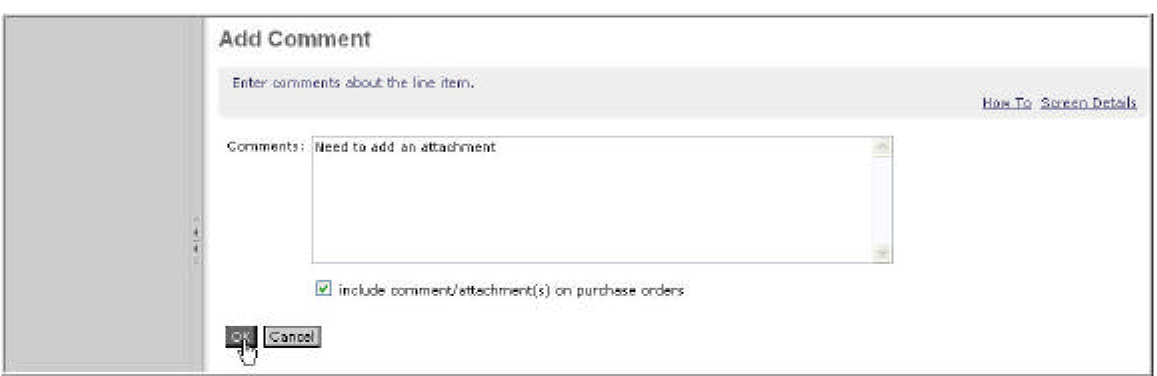
You can add comments and attachments to a line item to provide additional details about your request.

Comments are permanently attached to the requisition and can be viewed by anyone with access to the requisition, including approvers. Approvers can also add their own comments to the request.

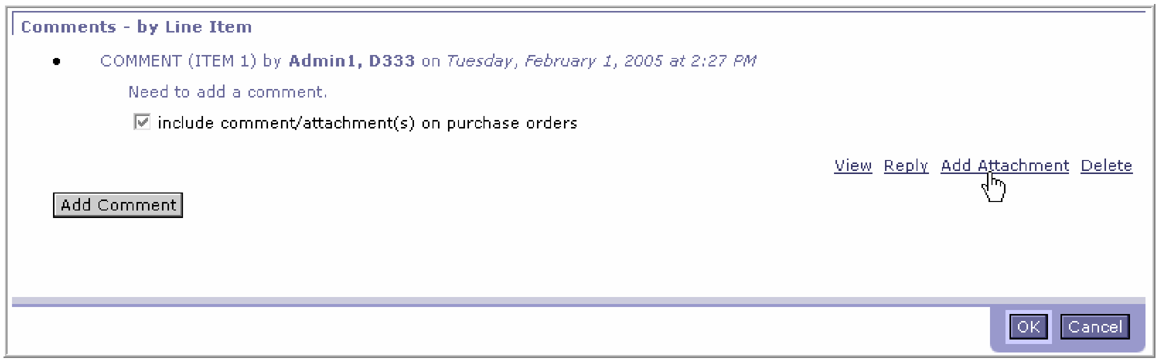
The checkbox **(include comment/attachment(s) on purchase orders)** indicates whether the comment remains internal to the requisition or whether it is sent to the vendor on the purchase order. Leave the box unchecked, for example, if your comment is only intended for an approver.

To add a comment at the line level, select the **Add Comment** button in the Comments - by Line Item section.

At the Add Comment screen, enter a comment in the Comments field. If it should be seen by the vendor, check the box below the Comments box, as shown:



When you have entered your comment, select **OK** to go to the Comments - by Line Item screen, where you can add any necessary attachments. Select the **Add Attachment** link if desired. Instructions on how to add an attachment is provided under the section Add Attachment Screen of this guide.)



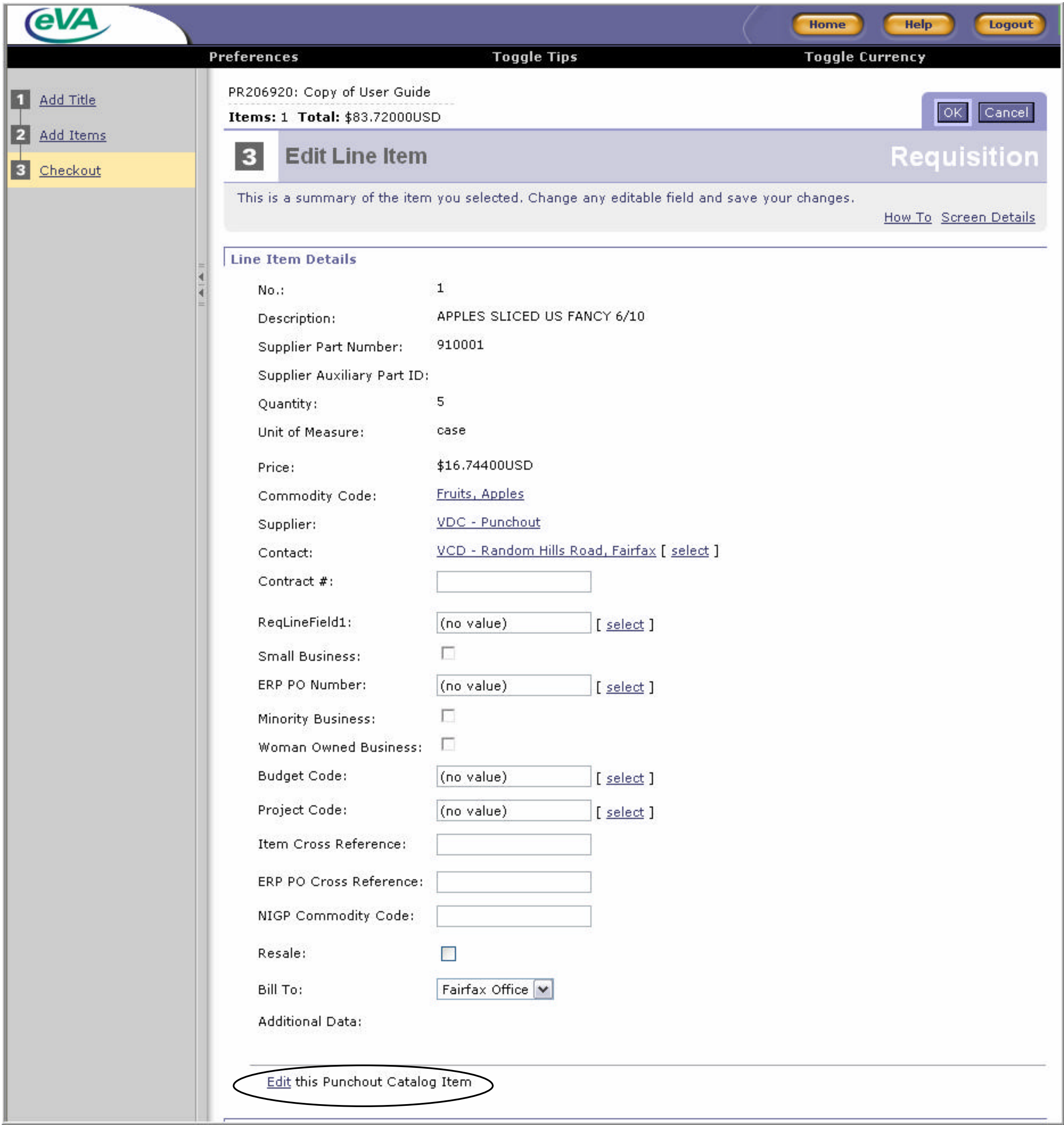
Once you have completed all of your edits, select **OK** to review your modifications.

You will be returned to the CHECKOUT screen.

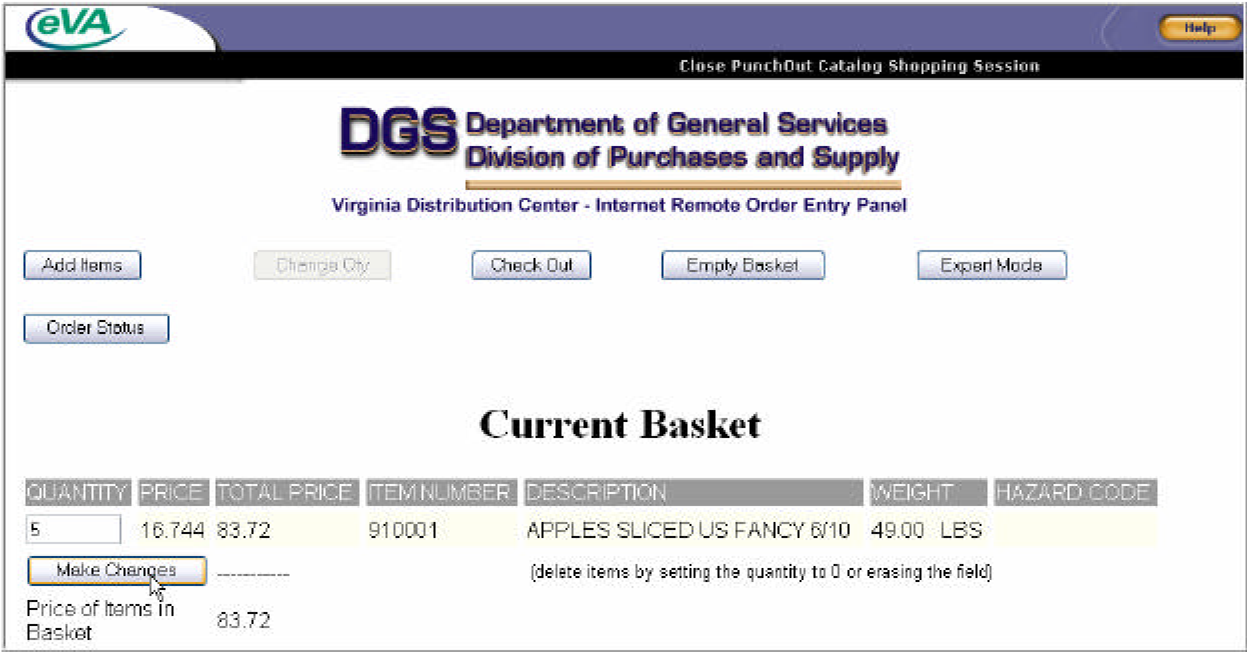
Editing Punchout Items

Unlike regular hosted items where you will be able to change the quantity, editing punchout items is slightly different. Because buyers must access the vendors' website to purchase the goods, buyers must also access the vendors' website to edit the request.

Select the **Edit this Punchout Catalog Item** link to access the vendor's website.



Select the **Make Changes** button. (NOTE: This button will differ according to each vendor)

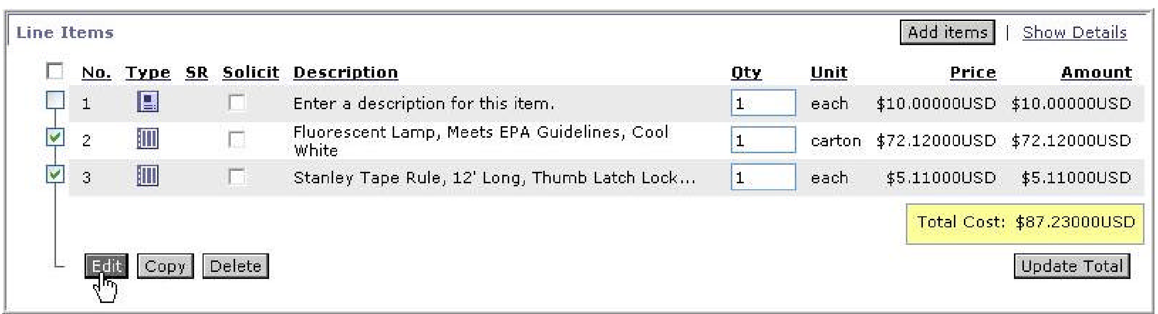


Mass Editing

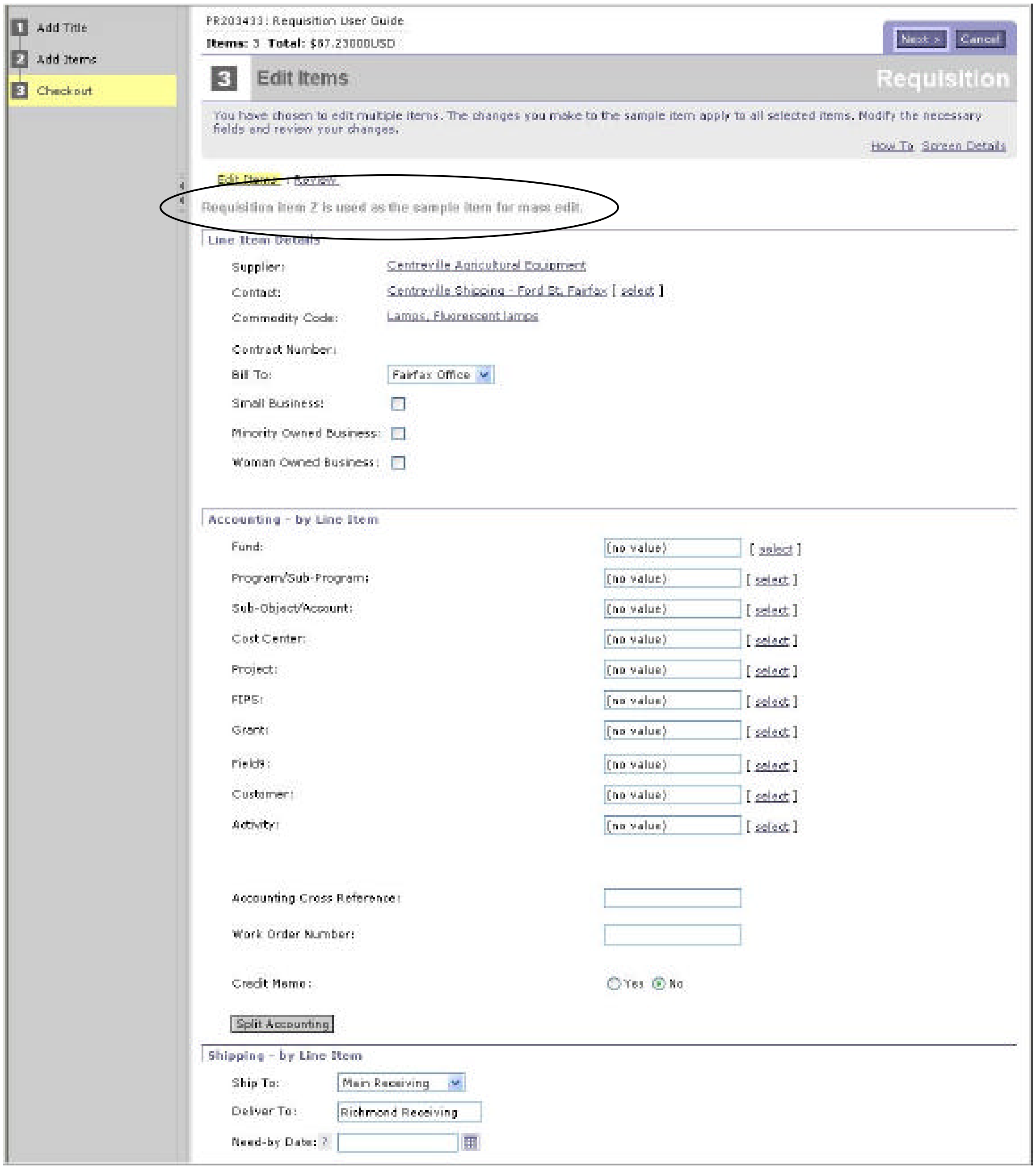
To edit multiple items at the same time, select each item you wish to edit with the SAME information by selecting the checkbox next to the applicable item.

To mass edit ALL items at once, select the top checkbox next to the **No.** caption.

Select the **Edit** button below the items.



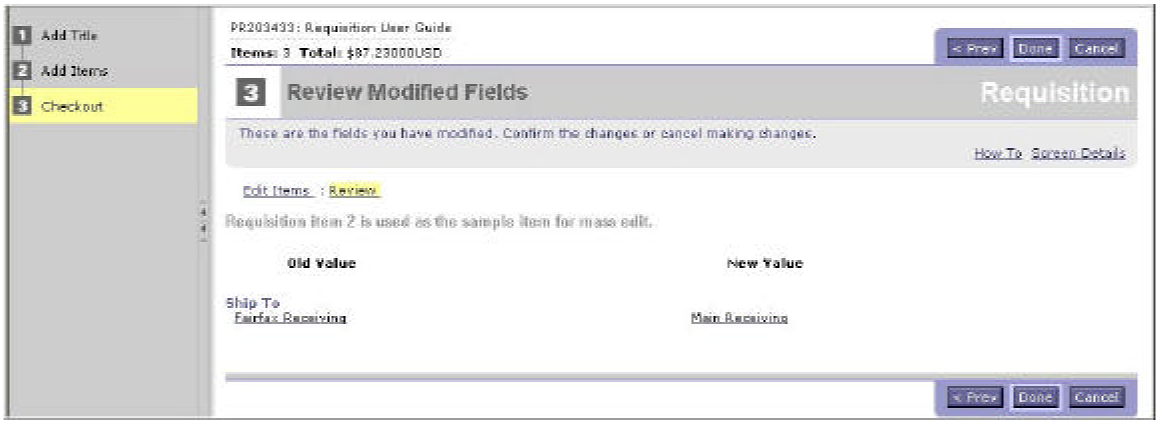
The Edit Items screen opens. Although the Mass Edit screen only displays information for the first item selected on the Checkout screen, any changes that you make to this line will apply to all items selected.



Review Modified Fields

The Review Modified Fields screen displays a summary of the fields that you have changed on the first line, and that will be systematically updated on the selected requisition lines.

This screen compares the old line's information with the new so that you can verify the changes you have made.



When your review is complete, select **Done** to return to the requisition Summary tab where you can submit or exit this requisition.

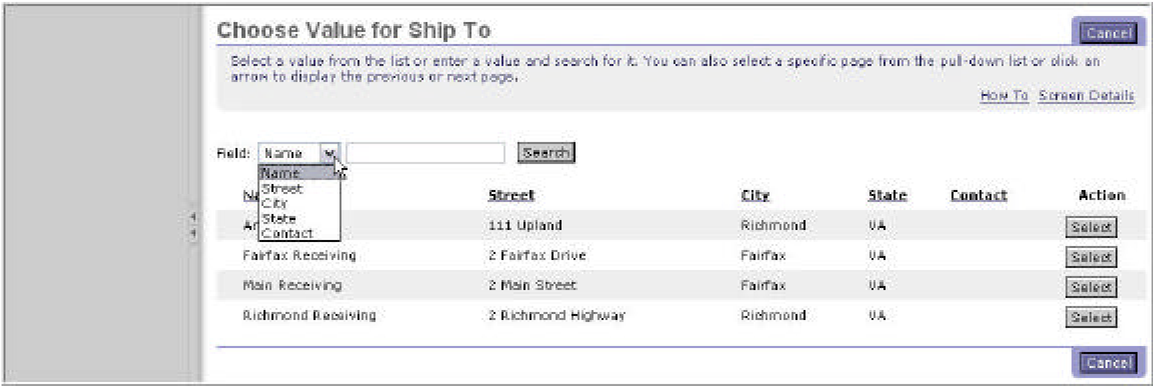
Adding Shipping Instructions for Entire Requisition

The Shipping – Entire Requisition section on the Checkout screen allows you to either accept the defaulted information or to enter new shipping information for the entire requisition. To ship the items to one or more locations, select the **Edit** button in the Line Items section and make the appropriate changes in the Edit Line Item screen.

Default shipping preferences are pre-populated based on your User Profile. To keep the default values, no action is required.

To change the default Ship To: address, select *Other...* from the drop-down menu. If you are a local government, type your organization code preceded by an "L" as show in the screen below, then select **Search**.

You may also search for the Shipping address by Name, Street, City, State, and Contact. When the address you need appears, choose the **Select** button.



There are three shipping detail fields to enter:

Field	When and How to Use
Ship To	Select the destination for the order. Use the drop-down list to select an address.
Deliver To	This field typically defaults to the individual preparing the requisition. Any name can be entered in this field.
Need-by Date	The Need-by Date designates when you require the items to be delivered. The calendar next to the field allows you to choose any future date.

Adding Comments for the Entire Requisition

You can add comments and attachments to a requisition to justify your request or provide additional details about your request.

Comments are permanently attached to the requisition and can be viewed by anyone with access to the requisition, including approvers. Approvers can also add their own comments to the request.

The **include comment/attachment(s) on purchase orders** checkbox indicates whether the comment remains internal to the requisition, or whether it is sent to the vendor on the purchase order. Leave the box unchecked, for example, if your comment is only intended for an approver.

If you need multiple header comments for the ENTIRE requisition (not at the line level), you may add additional comments AFTER the requisition has been exited either by submission or by saving. Refer to the section Adding Multiple Comments to Requisition Header.

If you are creating a Change Order or a Purchase Card Order, it is advisable to enter a comment to alert the vendor. Never enter your Purchase Card number in the Comments box.

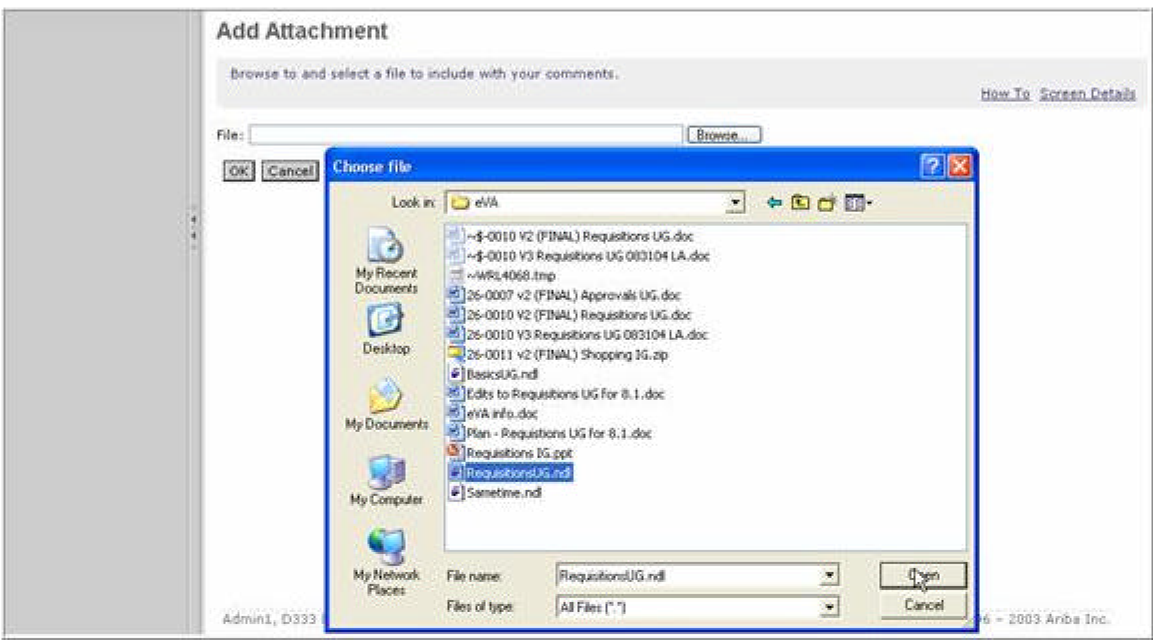
Comments and attachments can be applied to the entire requisition (at the header level), or to individual lines.

If you want to add an attachment, select the **Add Attachment** link.

Add Attachment Screen

The Add Attachment screen allows you to choose a file attachment from your local or network drive to include with the requisition.

Attaching a file in the eMall is like attaching a file in many other applications. Select the **Browse…** button to open your browser's file chooser.

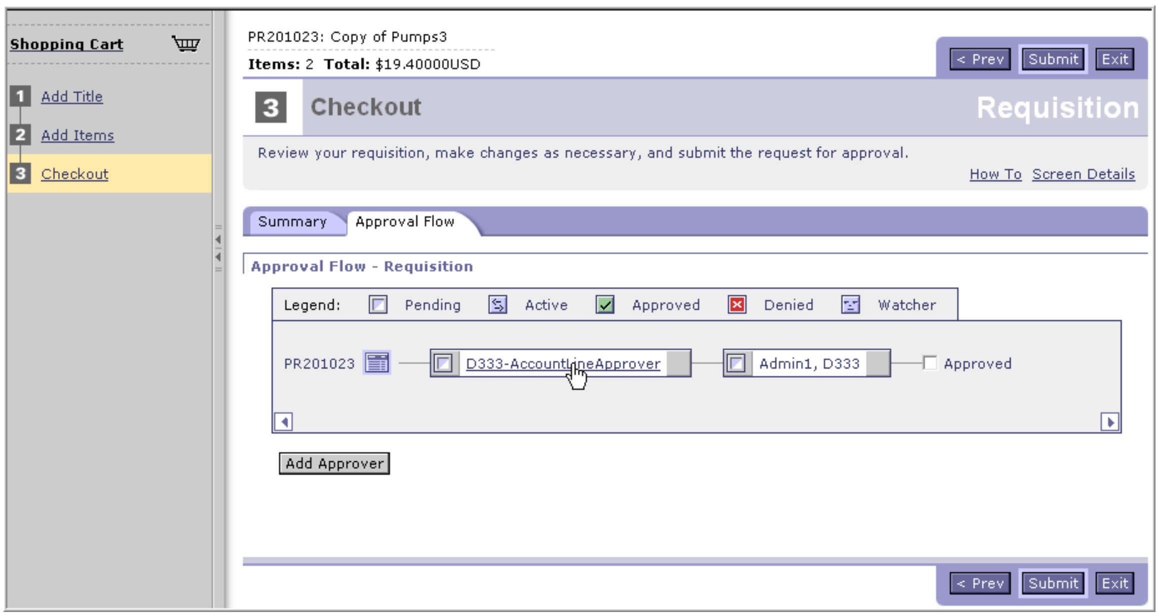


Highlight the filename and select **Open**.

Once the filename appears in the **File** field of the Add Attachment screen in the eMall, select **OK**. You will return to the Summary tab of the Checkout screen.

Approval Flow

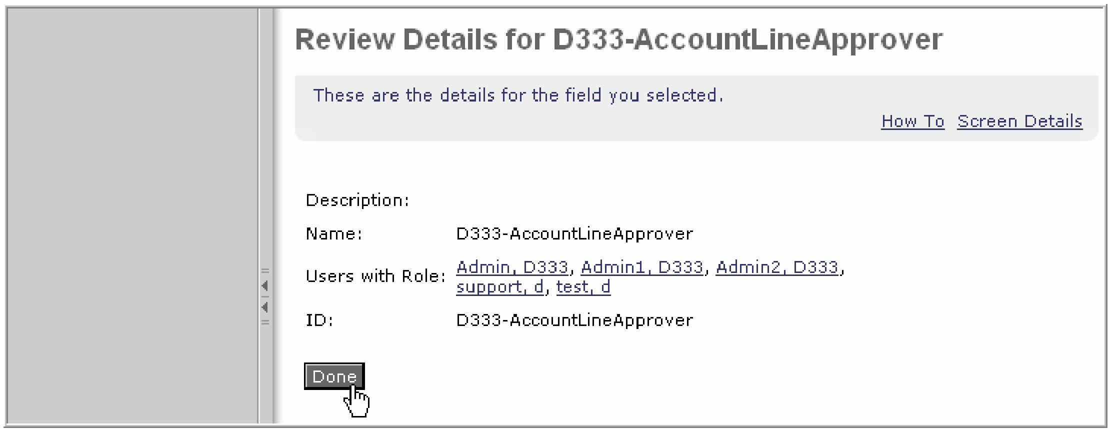
The Approval Flow tab displays approvals required by your organization for this Requisition and is accessible through the Checkout screen. Click the Approval Flow tab, as shown below, to review the workflow.



Each box in the approval flow shows:

- The state of the approval (as defined in the Legend; see table below)
- The person or role responsible for the approval
- The reason the approver is in the workflow (Let your mouse hover over the approval box to see the text)

If the approver is a group/role name, click the underline group/role in the approval box to see the users assigned to that group. Select the **Done** button when finished viewing.



Approver Types

Users may see three different approver types in the eMall.

- **Approver (Individual)** – A user who is the designated Supervisor or Expenditure Approver. Select the name to see more details about the individual.
- **Approver (Group/Role)** – A role name that can be occupied by one or more users. A common group for approvals is the Buyer Inbox. Typically, these are the procurement professionals who are designed to review the requests from end users for accuracy and/or sourcing.
- **Watcher** – can be either an individual or a group inserted in the workflow to alert someone of the pending purchase. Watcher approval is not required.

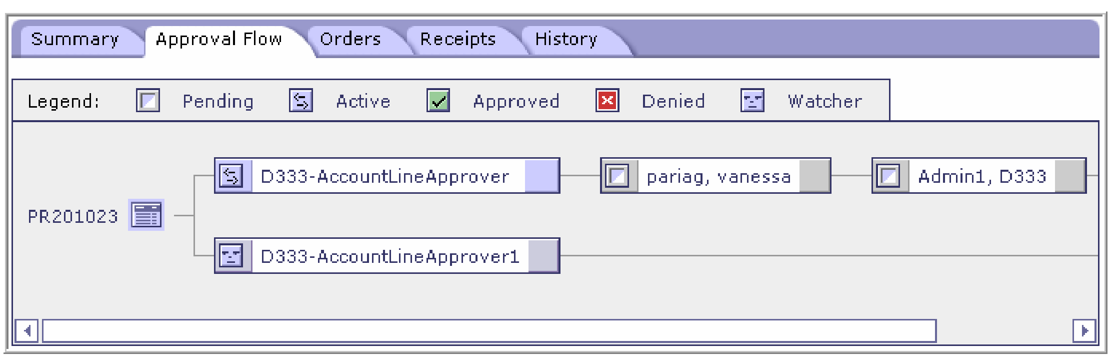
If your name appears as an approver at the end of the workflow (and it typically is not inserted in the approval flow at that point), the order is probably going to a vendor that cannot accept electronic orders. You must approve the requisition as the last approver. Find the resulting order(s) and print a hard copy of the order to fax or mail to the vendor. Refer to the Printing the Order section in this guide.

Only one member of an Approver group can approve the request. Once approved, the requisition proceeds to the next approver in the Approval Flow. The approval request is removed from the inbox of other members of that group since it is no longer active.

Parallel and Series Approvers

Approvers may be in Parallel or Series.

- Parallel approvers may approve requests simultaneously with other approvers
- Series approvers must approve requests in the sequence shown in the Approval flow



Parallel approvers are stacked vertically, while Series approvers show in a horizontal line.

Approval States

Each approval has a state that indicates whether it is ready to be applied, has been applied, or is waiting for another approval to be applied.

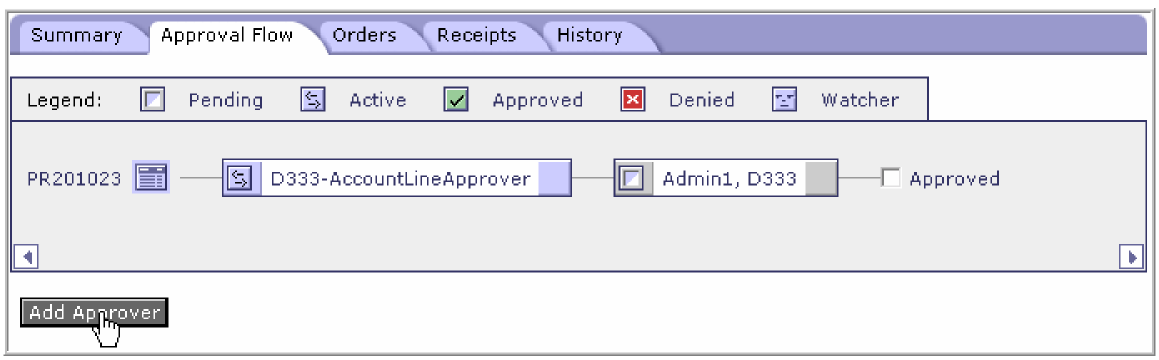
Approval State	Description
Pending	The approval is on hold until the requisition is submitted or all prior approvers have approved it.
Active	The active approval that is required.
Approved	The approval has been applied.
Denied	The approval has been denied.
Watcher	The approval is only a notification. The user sees the request, but does not act on it.

Approvers are notified by email that their approval is required. The approval box becomes Active based on the approval flow. Approvals cannot be applied before they become active.

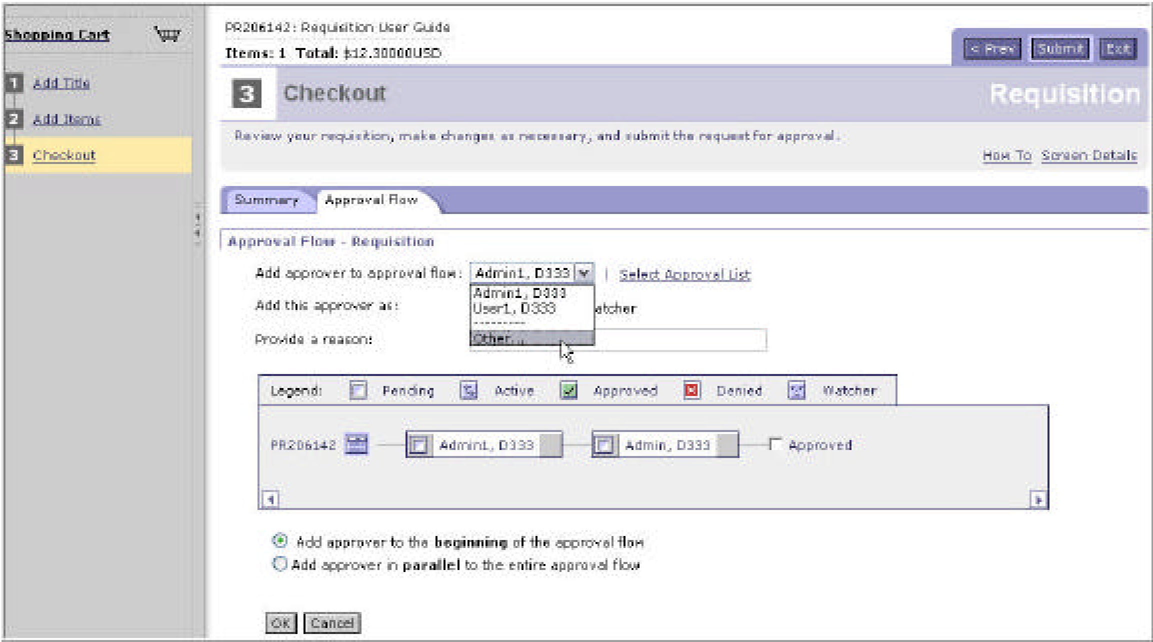
Adding an Approver or Watcher

Additional approvers or watchers can be added to the approval flow by the original requester, or by an approver who has the request for review. Do not add an approver to the workflow unless there will be no further edits to the requisition. Editing the requisition at any point will cause the workflow to revert back to the original approval chain, causing any ad hoc approvers to be removed.

Select the **Add Approver** button to begin the process of adding an approver.



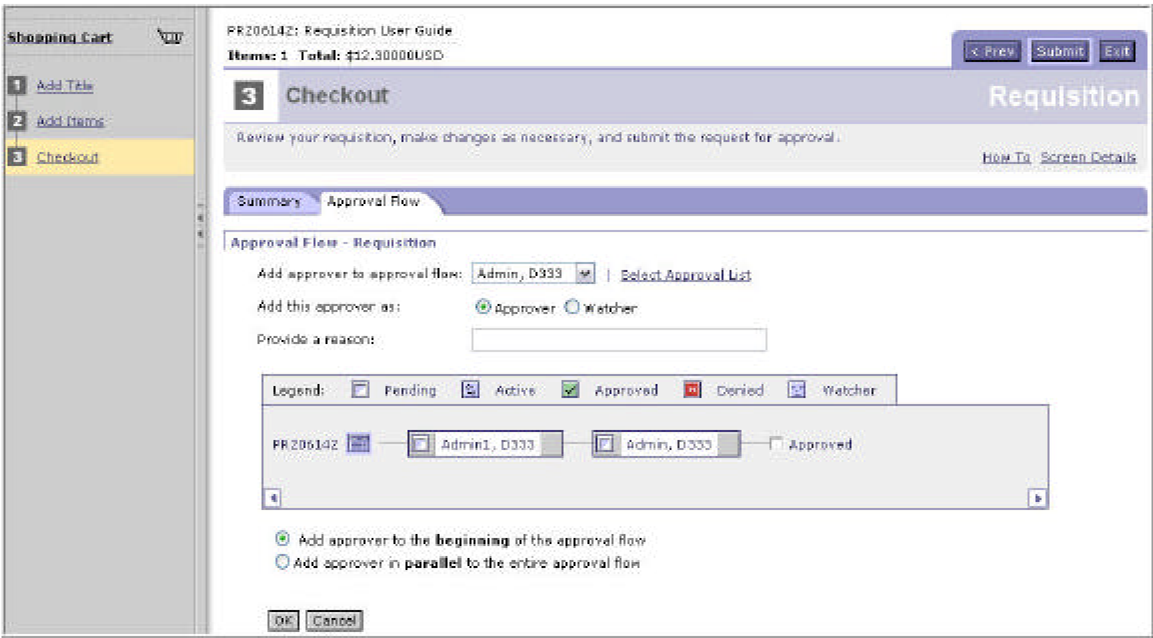
Use the Add approver to approval flow drop-down menu to select an additional approver. If the approver that you are looking for is not on the list, select *Other...* from the menu or select the **Select Approval List** link to see a complete list of approvers.



Type in the user you wish to add and then select **Search**.

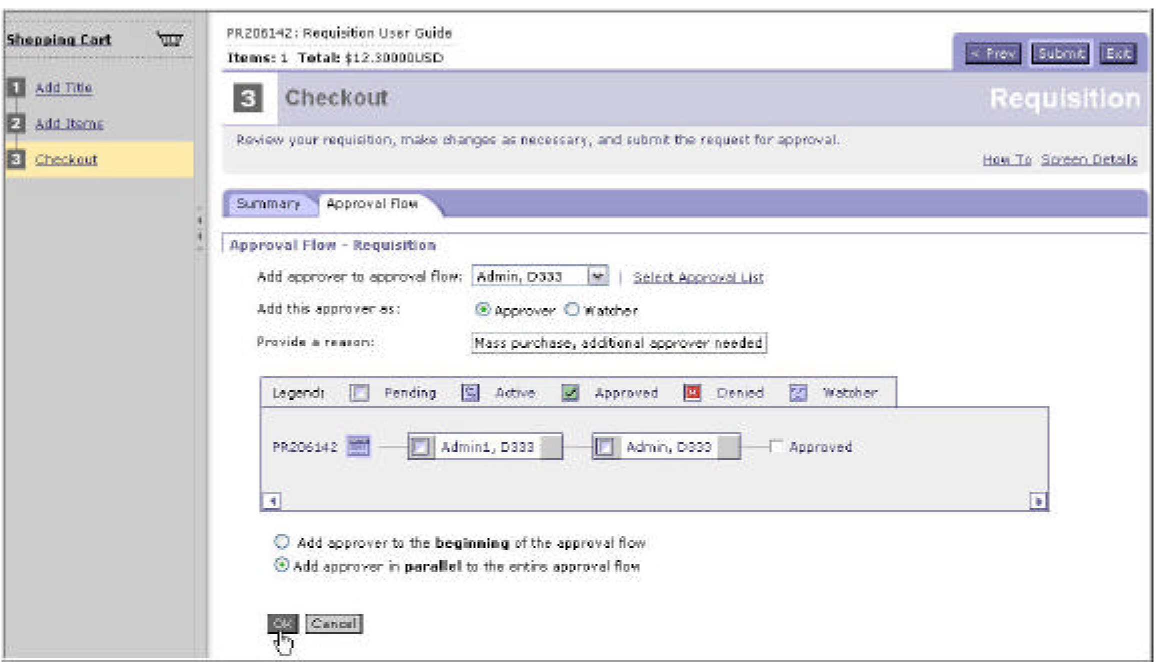
Once the approver you wish to add is listed, click the **Select** button.

The new approver now appears in the Add approver to approval flow box.



If the added approver is only a watcher (no approval required), select the *Watcher* option of the Add this approver as field.

Enter the reason for adding the approver/watcher. The approver/watcher will see this reason in their email notification.



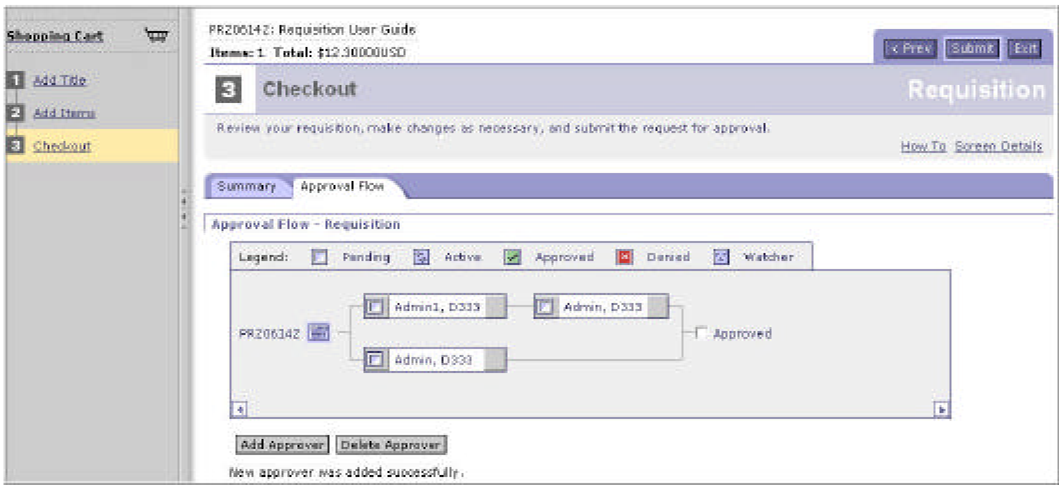
Select the position for the new approver.

- If you are preparing a request, you can add approvers to the beginning of the approval flow or in parallel to existing approvers.
- If you are an approver, you can add new approvers in parallel to later approvers or after them, based on the currently selected approver (indicated by the radio button).

Approvers cannot be added in front of approvers that have already acted on the request or in front of an optional approver.

Select **OK** when you have completed the information for adding an approver.

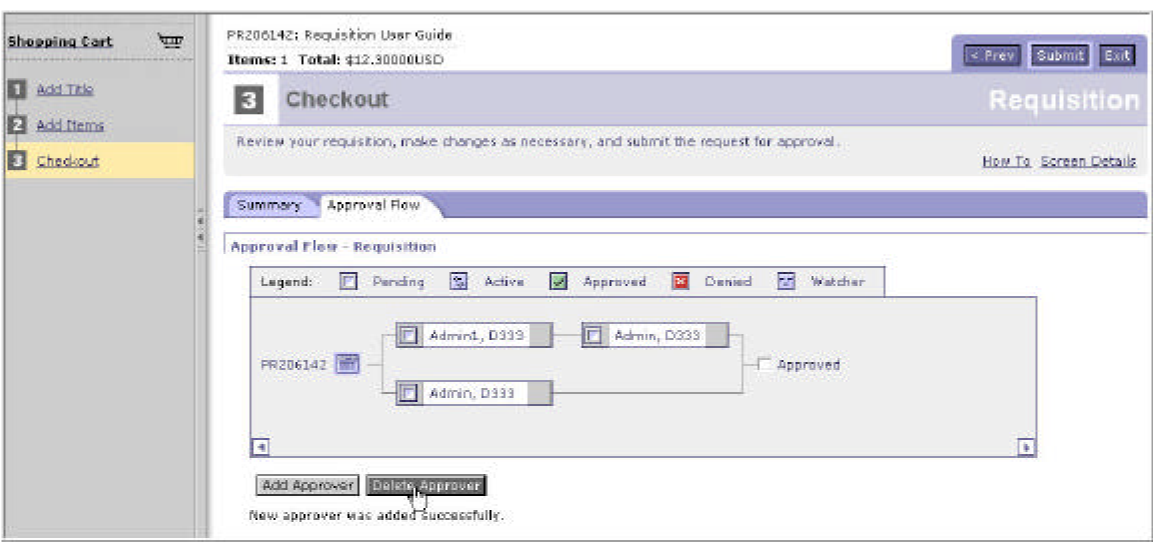
The new Approval Flow displays.



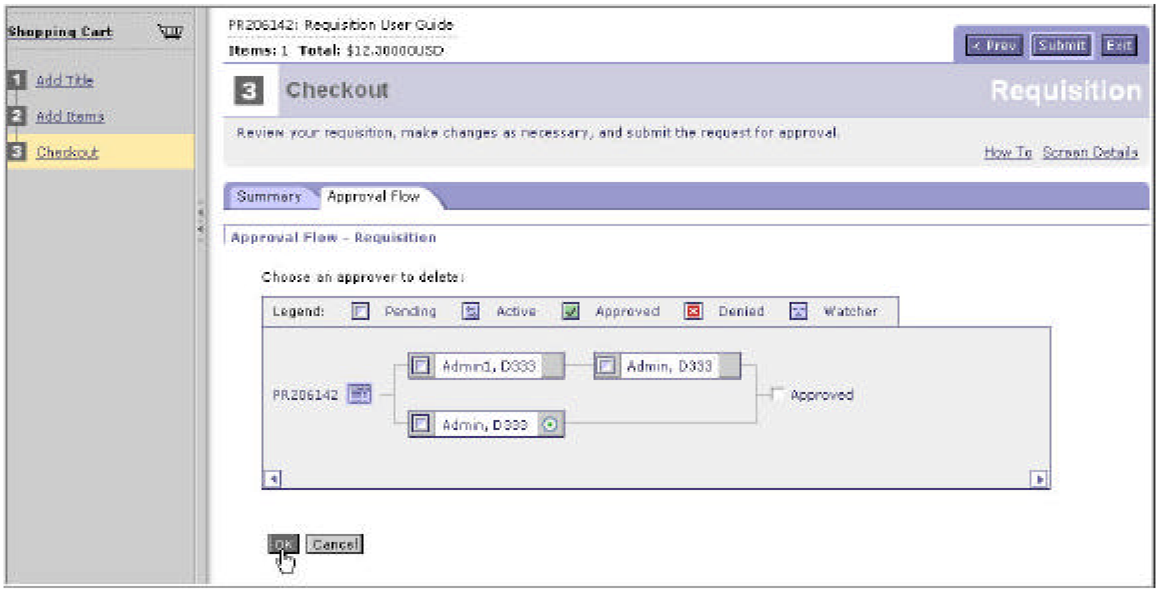
You may continue to add other approvers in the same fashion.

Deleting an Approver

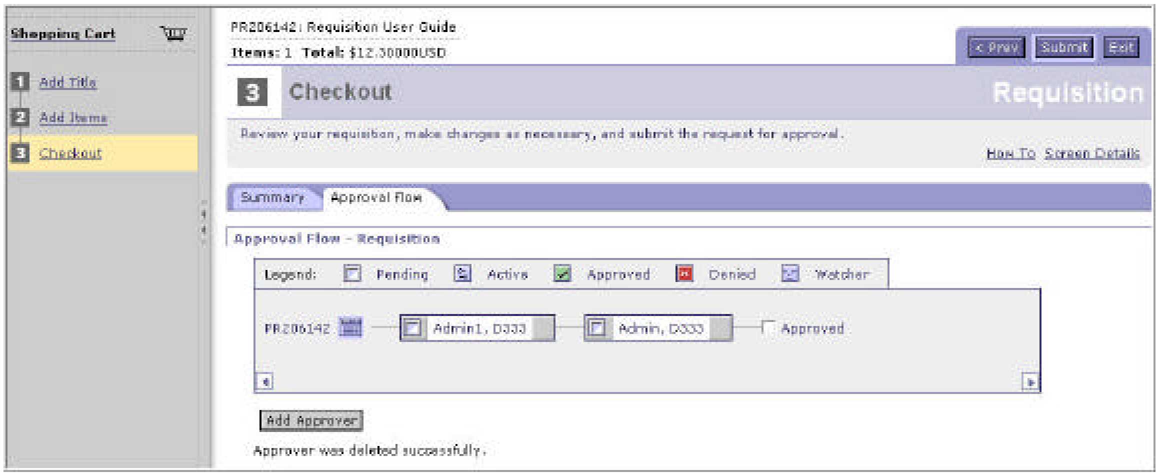
You cannot delete approvers that you did not insert. If you added an approver (ad hoc approver), you may delete the same approver by selecting the **Delete Approver** button. The **Delete Approver** button will only display if there is an approver that you can remove.



The selected radio button next to Admin, D333, indicates that this is the approver you wish to delete. Since you have added only one ad hoc approver in the example above, this is the only approver you will be able to delete. Select **OK** to delete the approver.



The Admin, D333 approver that you added is no longer in the approval flow.



Exiting the Requisition

If you are not ready to SUBMIT your requisition for whatever reason, select the **Exit** button, when available. The eMall displays the Confirm Exit screen.

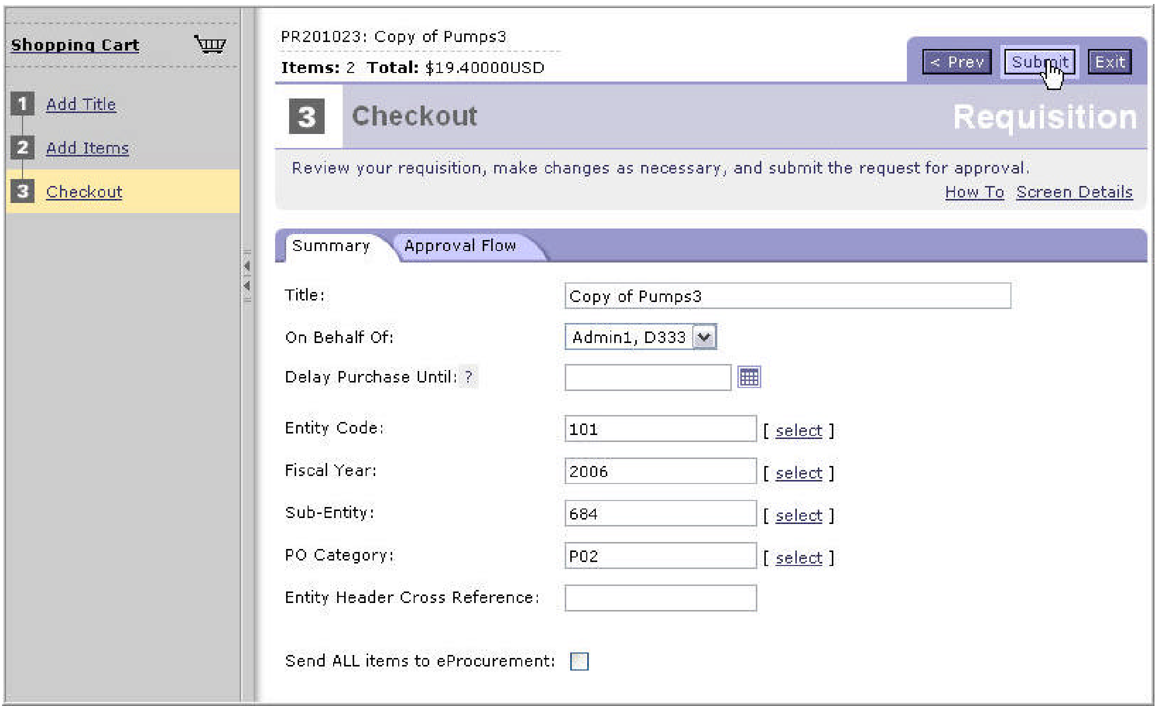
Take the appropriate action, as desired:

Option	Meaning
Save the request	The requisition will be saved in a Composing status. You can access your saved request(s) by selecting the Status option on the swoosh screen, or by clicking the Composing link located in the left menu. The request is on hold until you submit the requisition
Delete the request	The request will be deleted.
Continue working on the request	You can return to the request to continue working on it.
Print a copy of the request	Make a printed copy of the request using your browser's print function. CAUTION: This will not be a print copy of your pending Order. This prints the requisition, which is a different number than your order(s)!

Once a request is saved, you can use the Status screen to access the saved request for viewing or editing. It will be in Composing status.

Submitting the Requisition

Once you have reviewed the entire purchase order, you are now ready to submit the requisition. Select the **Submit** button.



Once you click **Submit**, a confirmation page will appear informing you that your order has been submitted.

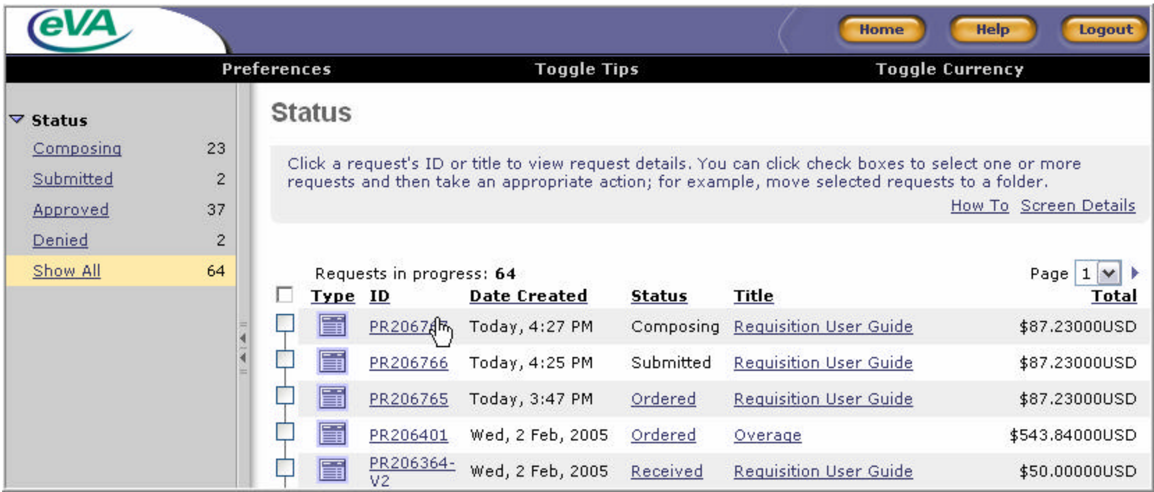
Printing the Requisition

At this point, you can print out a copy of the requisition for your records by selecting the Print link below. If you need to print the order, refer to the Printing the Order section of this guide. DO NOT send the printed requisition to the vendor. It's not the same as the eVA ORDER number.

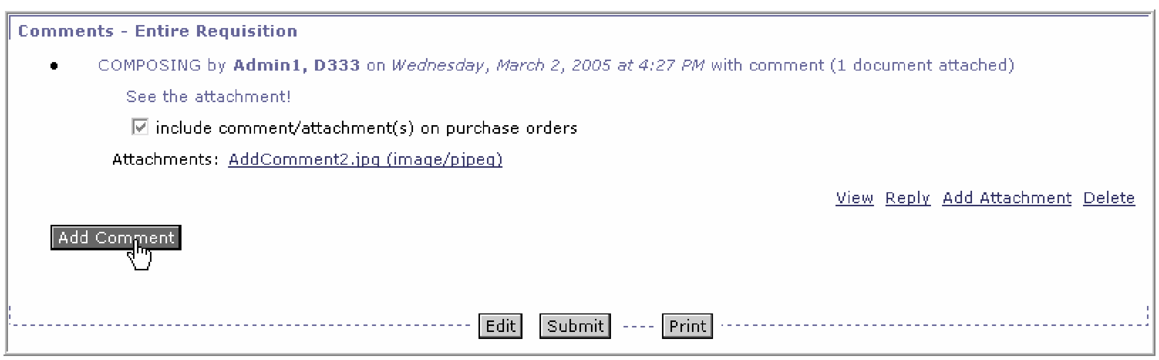
Adding multiple comments

Users may add additional comments to the entire requisition after the initial requisition has been created. The requisition can be in any status (composing/submitted/ordered) and comments may be added at any time regardless of the status of the requisition. For more information about requisition's statuses, refer to the Understanding Requisition Status section of this guide.

To add multiple comments to a requisition, click on the requisition ID from the Status screen. Do not click EDIT!

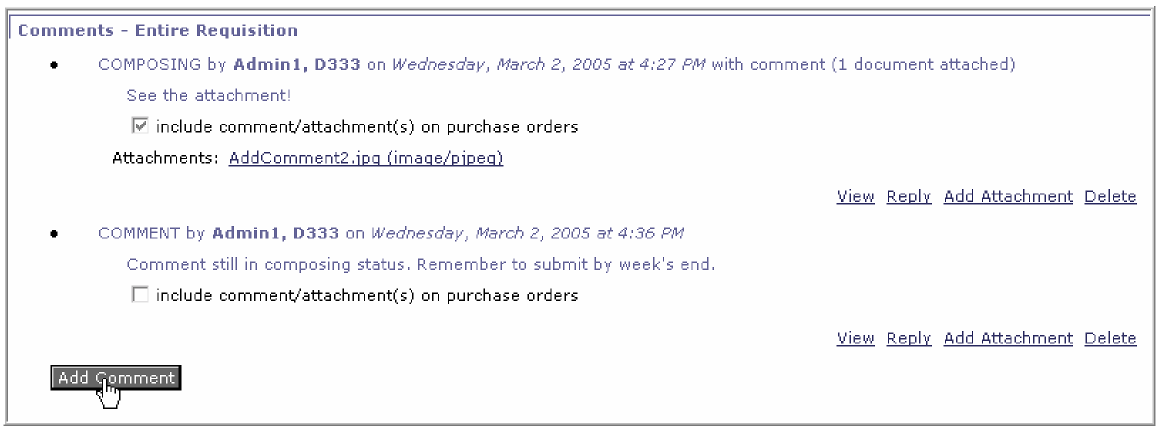


Scroll down to the Comments – Entire Requisition section and select the **Add Comment** button.



Add your comment and then select **OK**.

The new comment is now added.



The Comments – Entire Requisition section contains the **Add Comment** button regardless of the requisition's status. It lists all the comments that have been added to the requisition along with which user made the comment, when the comment was added, and whether there is an attachment added with the comment.

As the preparer of the requisition, you may add more attachments to any comment by selecting the **Add Attachment** link corresponding to that comment. To learn how to add an attachment, refer to the Add Attachment Screen section of this guide.

APPROVING THE REQUISITION

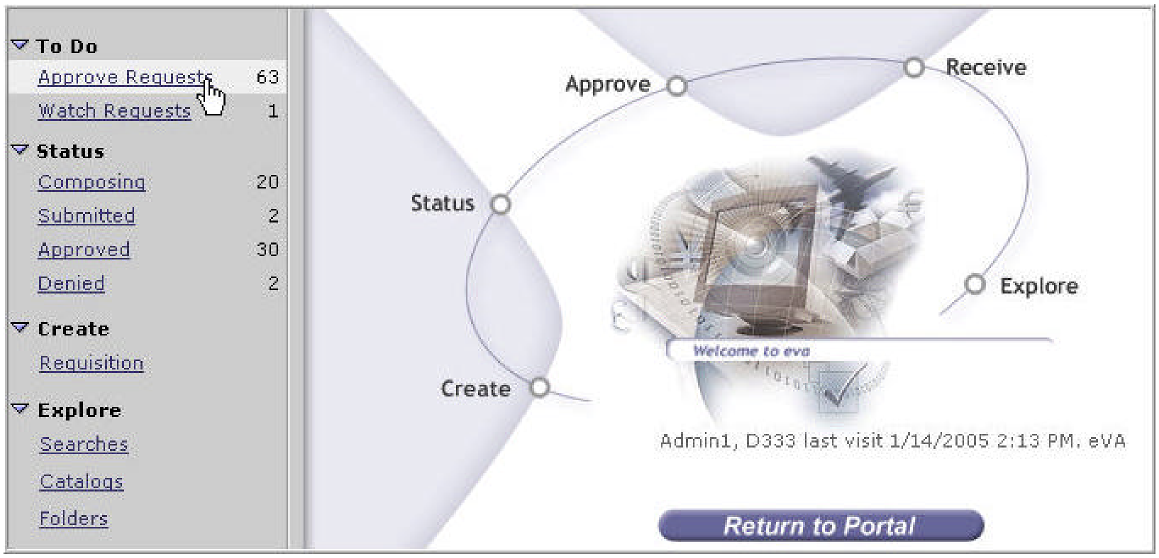
Most requests require approvals that are automatically assigned based on the user's profile, the business rules of the user's agency or organization, and the values on the requisition. Approvals are usually assigned to groups of users. Any user that is a member of that group (or role) can approve the requisition.

A final approval is also required when a vendor cannot receive orders electronically. In this case, an approval is added at the end of the approval flow as an indication to the preparer that an order must be printed and faxed or mailed to the vendor.

Approvers are notified by email when a requisition is awaiting their approval.

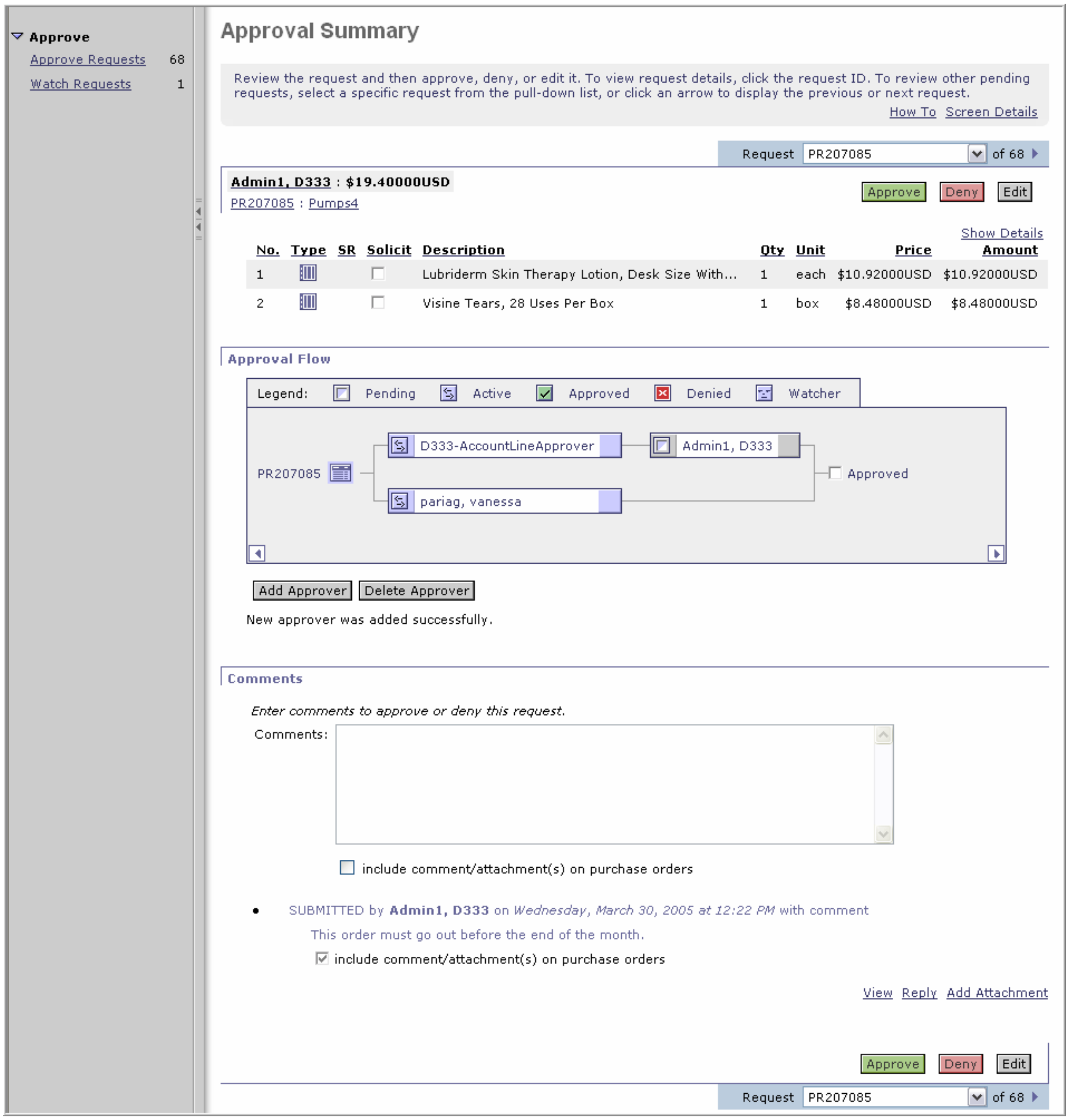
Accessing Approvals

To access the Approval Summary screen, select either the **Approve** button from the Swoosh image or **Approve Requests** link from the left menu



Select either the Requisition's **ID** or **Title** link from the Approve Requests screen.

The Approval Summary screen appears. The Approval Summary provides the information needed to make approval decisions, including a list of the items ordered, the Approval Flow, and Comments.



Approving Requisitions (New & Changed)

Before approving a Requisition, be sure to check the requisition details. Key details that will have major impacts are listed in the following table.

When you are satisfied that all information has been correctly entered, select the **Approve** button.

> *If several individuals are in an approval group, the transaction disappears from the Approve Requests Inbox when ONE of the designated approvers approves the requisition.*

If you want details that are not on the Approval Summary, such as Shipping details, select the Requisition's ID link above the first item line.

Detail to Review	Impact on Approval
Account Codes	Account codes may have been defaulted from the user's buysenseOrg. Since account codes are editable, all requisitions should be evaluated to ensure the correct codes are indicated.
Dollar value of requisition	Approvers should evaluate the total dollar value of the requisition.
Bill To & Ship To	Verify that the addresses are correct for each line item.
Comments & Attachments	Comments and attachments may provide specific details about what is being purchased and why. Verify the details and whether they will be included on the purchase order. If the comments and attachments are to be included on the purchase order, the **include comment/attachment(s) on purchase order** checkbox must be selected. Also review comments inserted by prior approvers.
Approval Flow	Verify the approval flow has all necessary parties. Additional approvers may be added if needed.
Shipping Details	Verify shipping details.

> *If the approver of a requisition is an individual (not group/role) and does not approve the requisition within 15 business days, the requisition is escalated to the approver's supervisor as designated in eVA. The initial approver is removed from the approval flow and can no longer approver the request.*

Automatic Withdrawal

If a requisition is submitted but not approved within 365 days, it will automatically be withdrawn and reverted back into composing status.

Editing a Submitted Requisition

Users in the eVA-Edit-Approvable group can edit the requisition and re-submit the revised requisition.

Users in this group will see an **Edit** button next to the **Approve** and **Deny** buttons. Users that are not in this group will not see this button.

Select **Edit** to open the requisition for edits, such as changing the quantity or a Bill To address. When finished, select the **Save** button to resubmit the requisition.

Editing the requisition causes the requisition to reset the approval flow according to the new values on the requisition. Ad hoc approvers added previously will need to be re-added, if applicable. All required approvals will be re-applied.

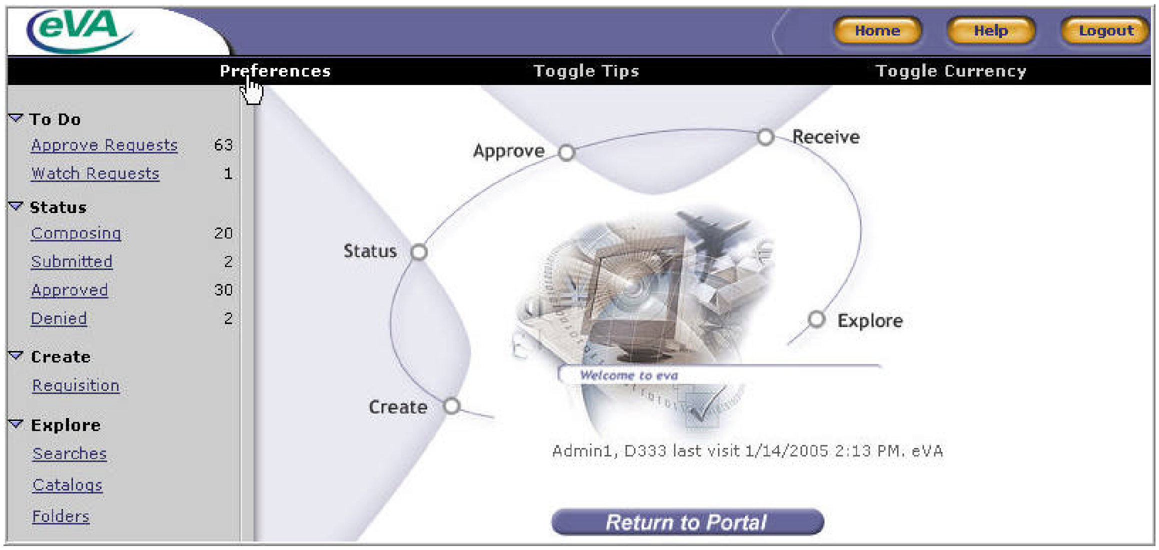
Refer to the Printing the Order section for instructions on how to find the order(s) associated with your approved requisition.

Delegating Approval

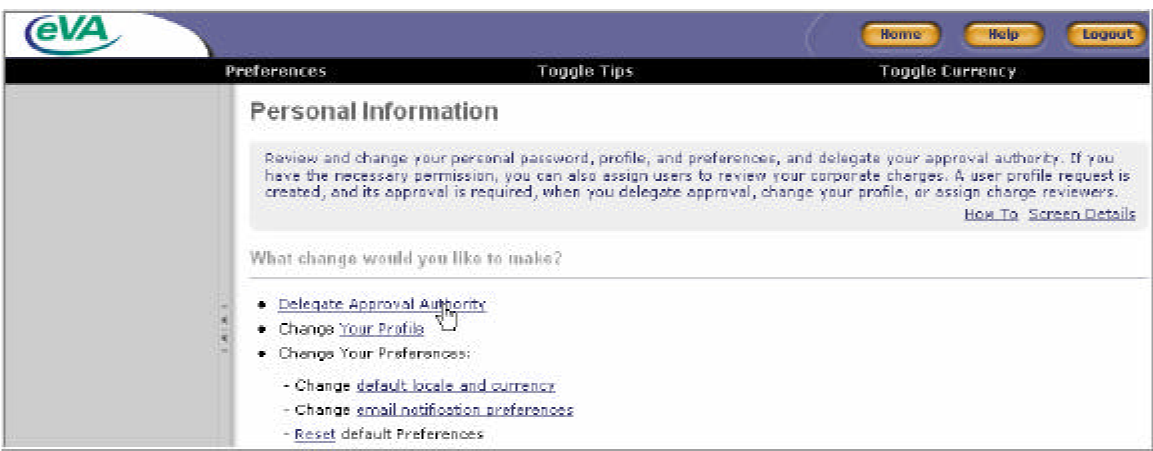
If you are unable to access eVA that could potentially cause a delay of the purchase, you can temporarily delegate your approval authority to another user for a specified period of time.

To delegate approval authority, go to the eMall Swoosh screen.

Select the **Preferences** link to open the Personal Information page.



Select **Delegate Approval Authority**.

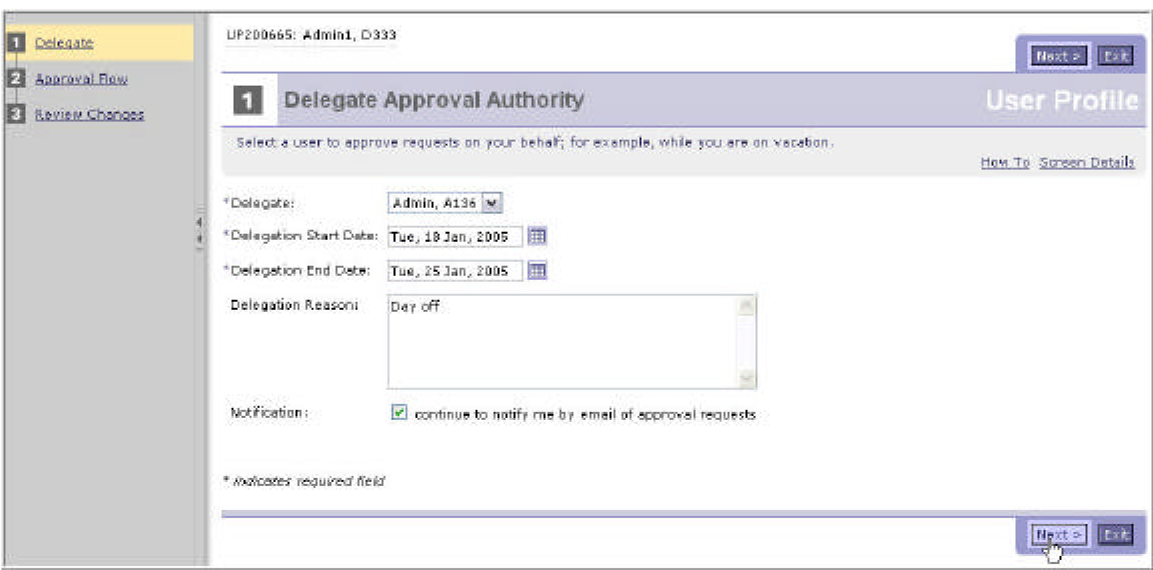


To set the Delegate field to the person you want as your delegated approver, look for the name in the drop-down list. (If it is not there, select *Other…* to get to a list of all users. Search for the user to select as the Delegate. Refer back to the Adding an Approver section to learn how to use the *Other*… option.)

The Delegation Start Date is the first date your delegate can act as your approver. Use the calendar icon to select the date. Set the Delegation End Date as the date your delegation of authority is no longer active. Enter a Delegation Reason, if desired. The delegation begins/ends at midnight on the specified dates.

Your delegate will receive email notification of all approvals that would ordinarily have gone to you. If you want to continue receiving those same notifications at the same time, select the Notification checkbox. If you do not want the email notifications, deselect the checkbox.

Select **Next** to proceed to Step Two – Approval Flow.

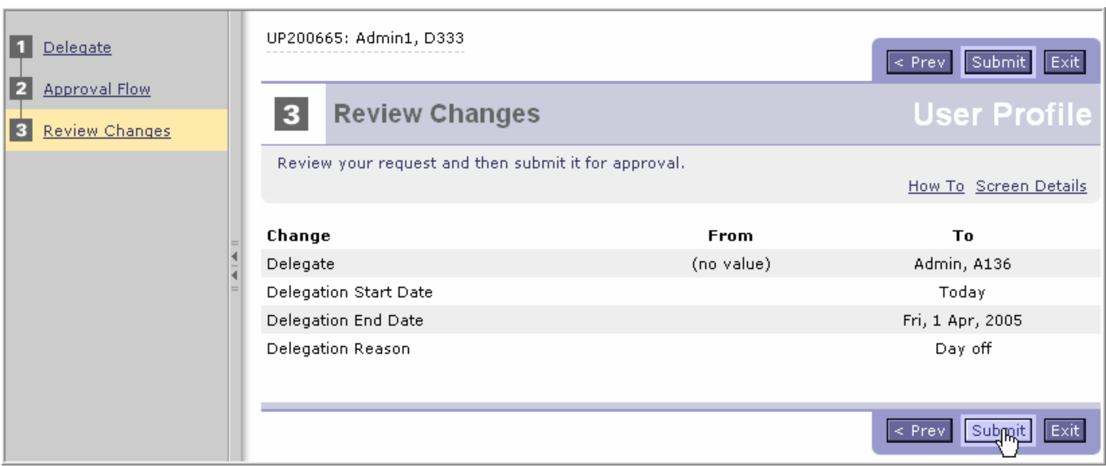


The Approval Flow screen graphically displays the Approval Flow for this request.

You may add an additional approver for this delegation, if necessary, or select **Next** to proceed to Review Changes.

The Review Changes screen displays all changes you have requested so you can review your changes before you submit them.

Select **Submit** to activate your delegation of authority.



Act as User Screen

Once the delegation period starts, your delegated approver will be prompted after selecting **Shop Now** to select which user to use for the session. The delegate can choose to act under his own name for regular eMall functions, or to act as an approver on behalf of someone else.

If you act as an approver, you will not be able to create requisitions under that user.

Active Delegation of Authority

If you log in during the time that you delegated your approval authority to another, you will be notified that you have an Active Delegation of Authority. Select the option to **Continue** using the delegation of authority or **Stop** using the delegation of authority. This is effective immediately.

*Even if you decide to continue using the delegation of authority, this does not limit your ability to approve your requests. You may still log in, select **Continue**, and approve requests that require your approval.*

PRINTING THE ORDER

Finding the Order

Orders are created once the requisition is approved and is in Ordered status. Each order number is preceded by a prefix which helps to indicate what kind of order it is.

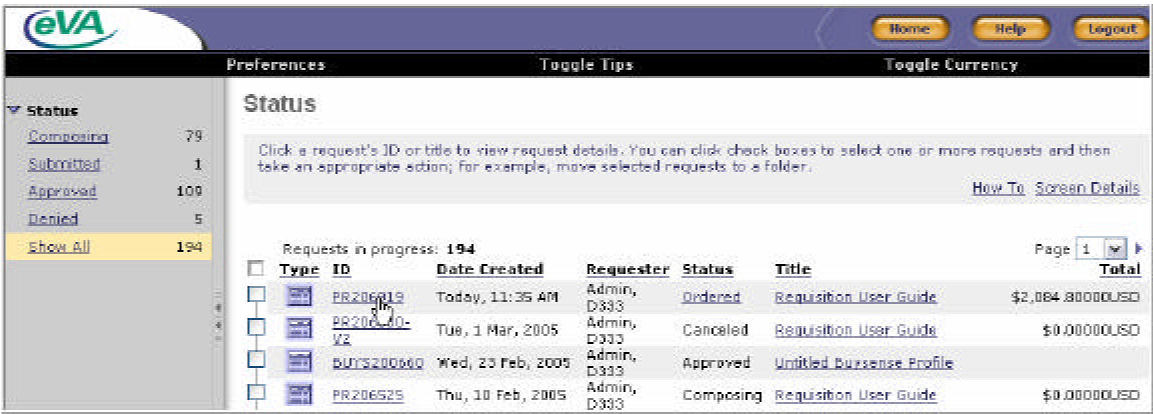
Prefix	Type of Order
DO	Direct Order
EP	Electronic Purchase Order
IRQ*	Imported Requisition
PCO	Purchase Card Order
POB	Purchase Order Buysense
QQ	Quick Quote

*This prefix is determined by the ERP system that imported the order and may be different for each system.

To find an order, you must first locate the requisition that the order is part of.

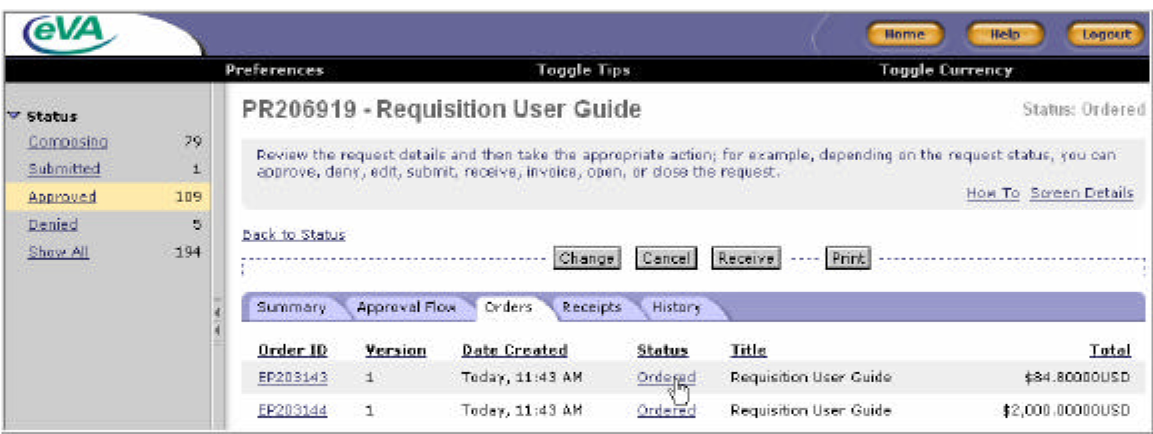
From the Swoosh, select the **Status** button or the Approved link in the left menu.

From the Status screen, find the appropriate requisition and verify that the requisition is in *Ordered* status. Select the requisition's **ID** or **Title** to open up the requisition.



Once the requisition is opened, select the Orders tab to view the orders of this requisition.

In the example below, the requisition created two different orders. To determine which order you need to print to send to the vendor, select the **Ordered** status of the order.

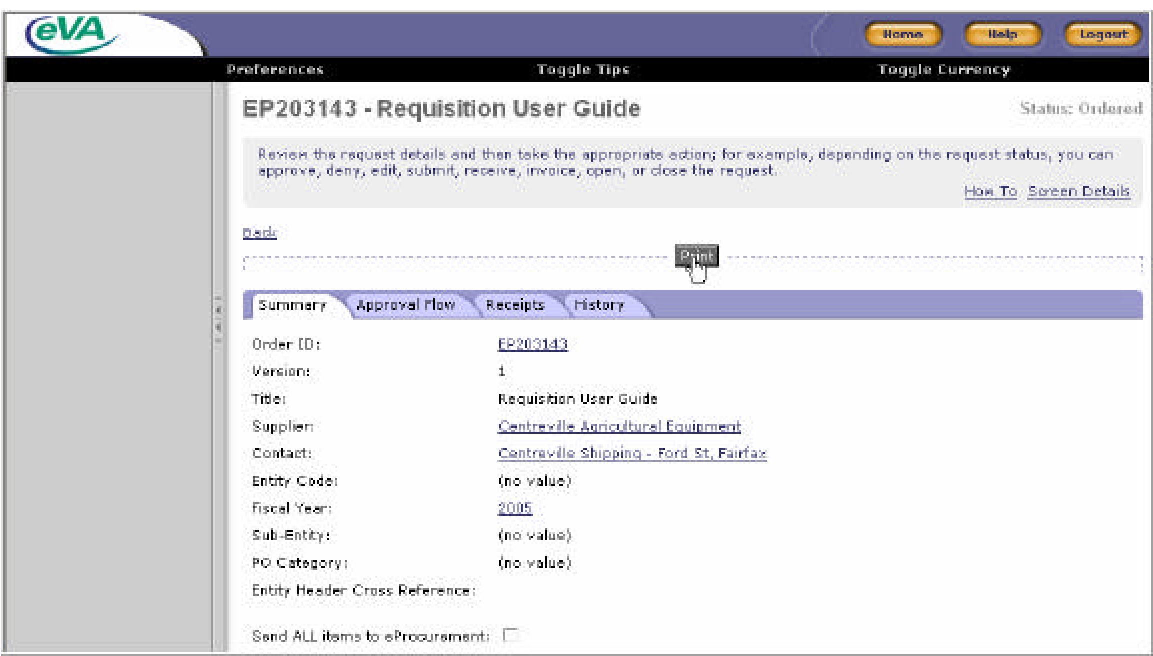


If the following type screen displays, you will need to PRINT and fax/mail the order:

Select the **Back** link.

When you return to the Requisition's Order tab, select the Order ID that you need to print.

Once the order opens, select the **Print** button.



Printing an Order

The order opens in a separate browser. From the browser main menu, select **File > Print** or simply press **Ctrl+P** to print the request.

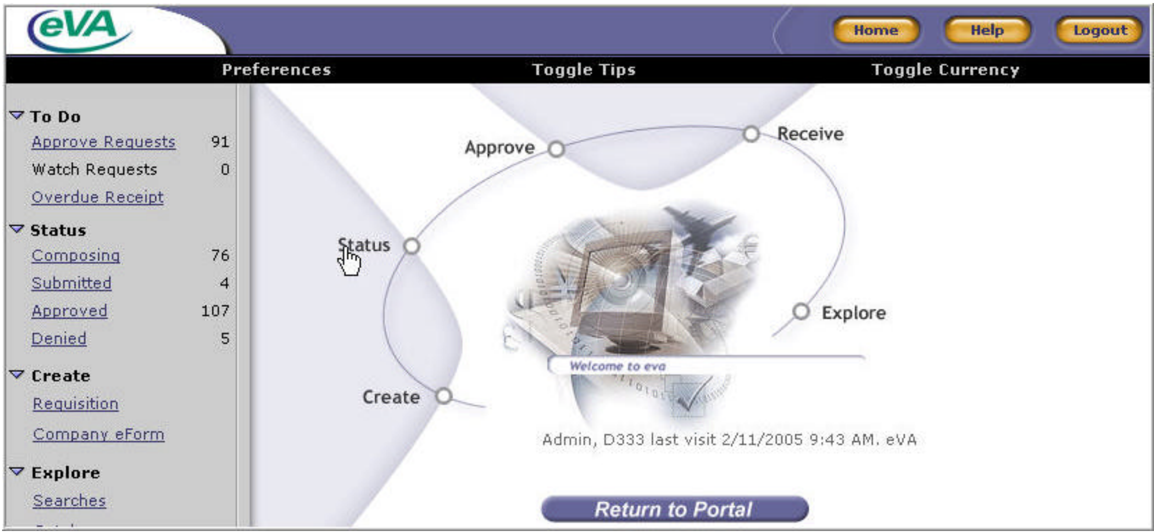
Once the order is printed, you can close out that browser window. This does not close your eVA session.

To view other orders associated with this requisition, repeat the above process and print the order, as needed.

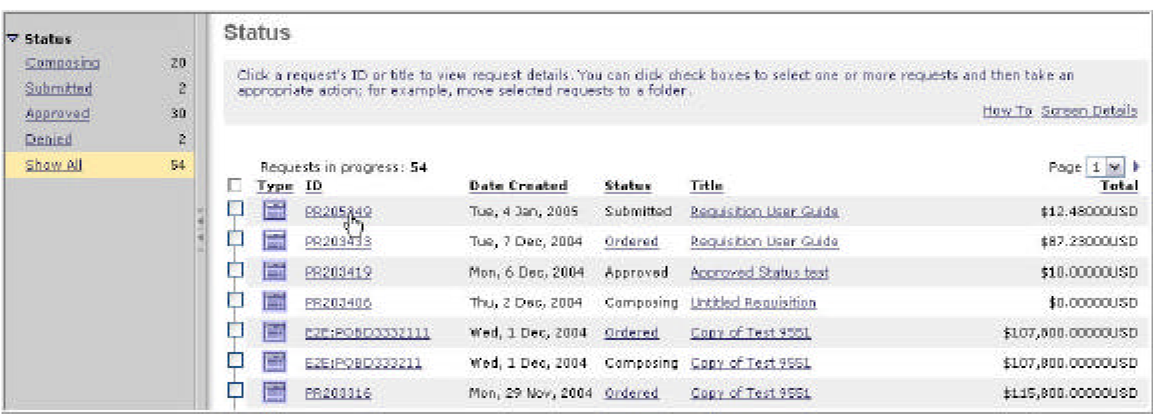
REVIEWING THE REQUISITION HISTORY

You can track the history of your requisition and the orders created from the requisition using the History Tab.

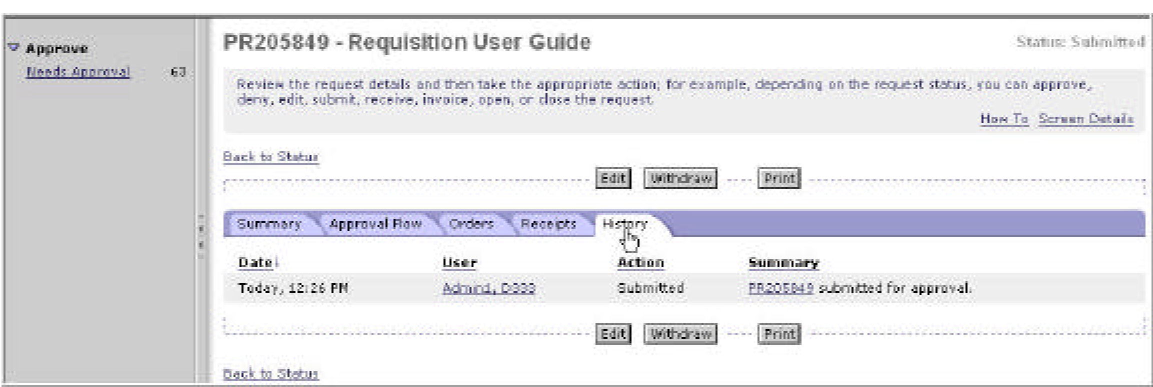
To access the History Tab of a requisition you must first find the requisition. Select **Status** from the Swoosh screen to find the requisition.



Open the requisition that you want by selecting either the requisition's **ID** or **Title**.



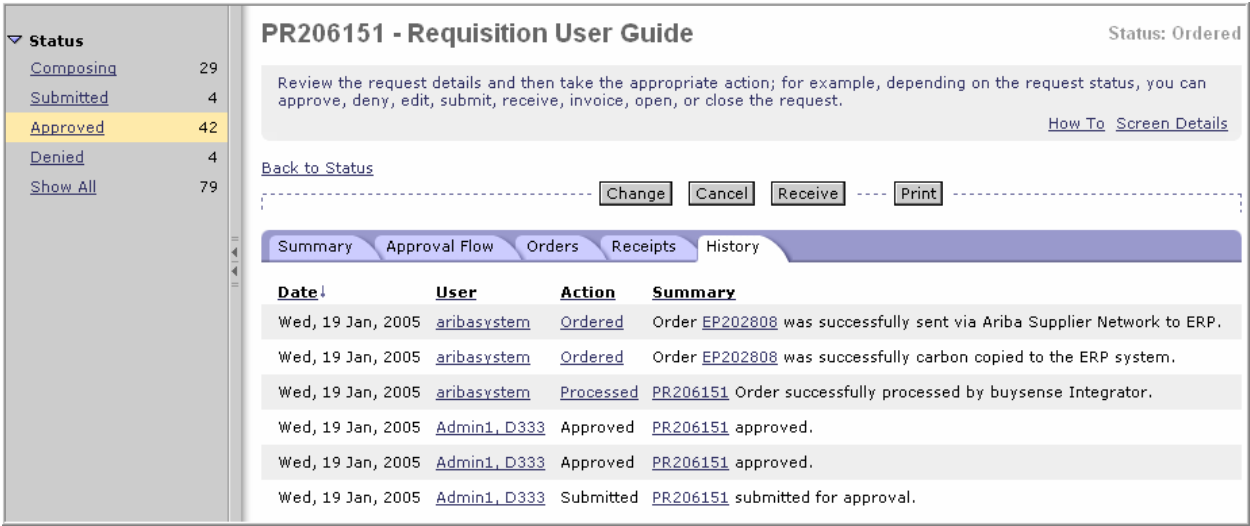
Select the History tab to view the history of the requisition.



History Tab

The History Tab records each step of the requisition through submission, approval, ordering, and receiving. It shows orders that are created, any new versions created through change orders, and displays the new versions of the requisition and resulting orders.

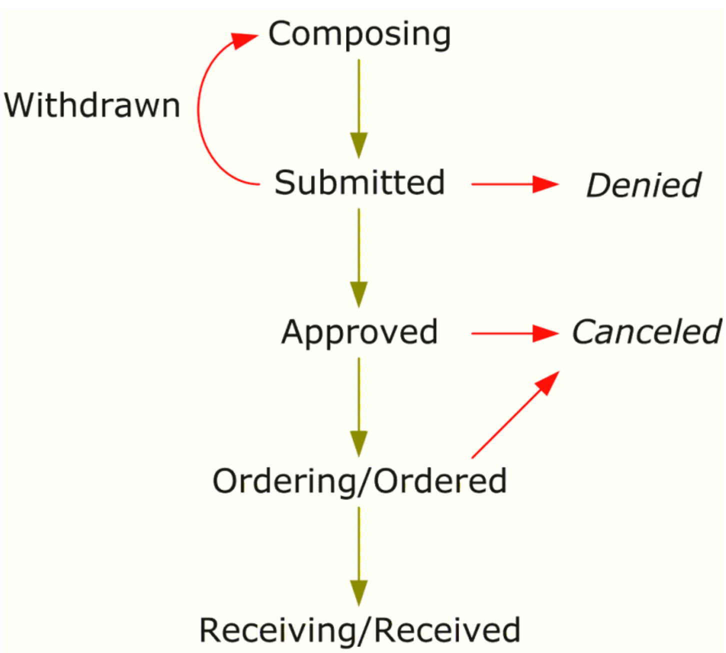
Select the Request ID in the Summary column to view the specific request information.



Understanding Requisition Status

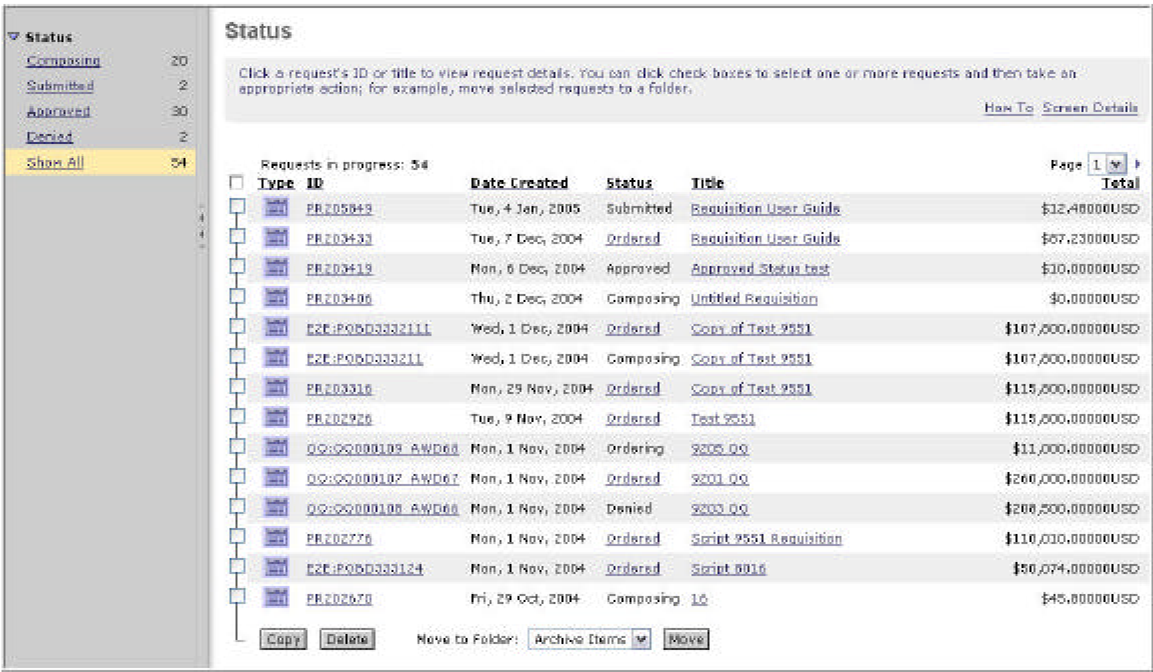
The order process starts with the requisition and ends when the vendor is paid for the items received.

Each step in the process changes the status of the request. In this section, you will look at the status assigned to requisitions. There are also alternatives to the process—ways to interrupt the usual flow.



As a request flows through the approval process, eVA can automatically keep the relevant people informed by sending notification messages.

You can check on the status of your requisition via the Status screen.



The following chart provides additional detail on eVA requisition statuses.

Status	Description
Composing	User is still working on the request and has not yet submitted it. Only the preparer of a request can submit it.
Submitted	The request has been submitted and is somewhere in the approval process (neither fully approved nor denied). To make a change to a submitted request, the preparer can Withdraw it. A request stays in Submitted state until one of the following occurs: 1. Everyone approves the request (status changes to Approved). 2. Someone denies the request (status changes to Denied). 3. Preparer decides to withdraw the request (status changes back to Composing).
Denied	Someone in the approval chain has chosen to deny the request. The request stays in Denied state indefinitely, unless: 1. Preparer decides to withdraw the request (status changes back to Composing). 2. Preparer chooses to resubmit it.
Approved	Everyone in the approval chain has chosen to approve it. eVA converts the requisition into one or more orders and sends those orders to the relevant vendors. If there is a Delay Purchase Until date, the requisition is held in Approved status until the morning of that date.
Ordering	A fully approved requisition is now being converted to one or more orders. Usually requests are in this state for a brief time, while the order is being generated and transmitted. Once an order is transmitted successfully, the request moves to the Ordered state. Occasionally a request may linger in the Ordering state, such as when there is a problem transmitting the order to the vendor. If a requisition stays in this status longer than a half hour, contact Customer Care at 1-866-289-7367 for help.

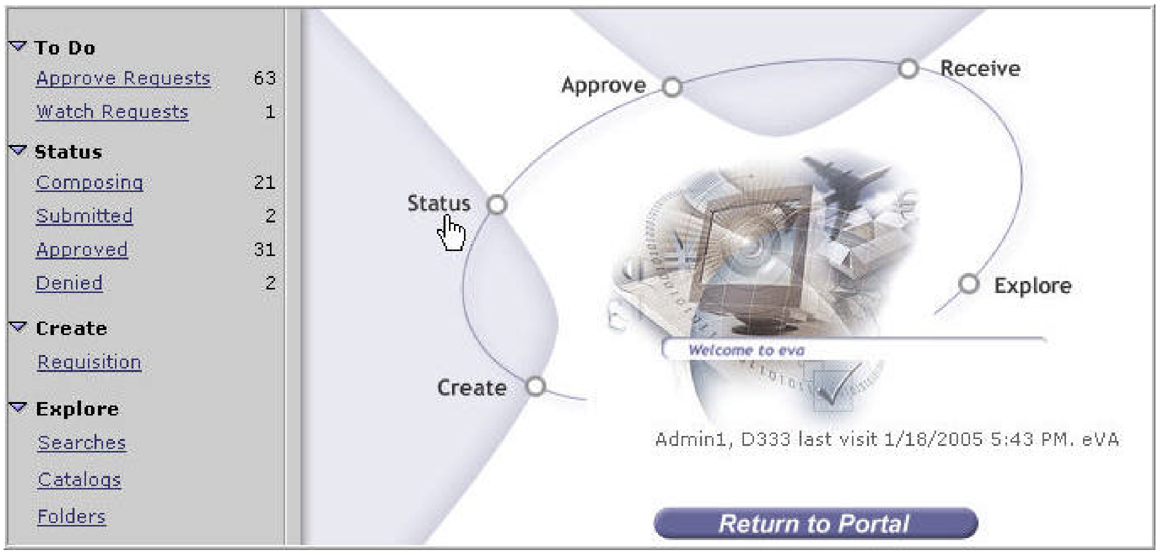
Status	Description
Ordered	The items on the requisition were successfully converted to one or more orders. A requisition stays in the Ordered state until one of the following happens: 1. Receiving is done against the order, putting it in Receiving or Received status, or 2. The Requester cancels the order. The state of both the original requisition and its associated order change to Canceling or Canceled.
Canceling	The Requisition Preparer canceled the requisition after the order was created. Usually requests are in the Canceling state for a brief time, as eVA transmits the cancellation and confirms that the cancellation has been transmitted successfully. When the cancellation order is placed, the document transitions to the Canceled state. Sometimes a request may linger in this state, for example, if eVA is communicating with the Vendor by fax and there is a fax transmission error. If the requisition stays in this status longer than a half hour, contact Customer Care at 1-866-289-7367 for help. The Canceling state applies both to the original purchase requisition and to its associated orders. **Warning:** Canceling a requisition will cancel all orders created from the requisition. If you are trying to cancel one of multiple orders from a Requisition, use the Change Order functionality instead with quantities of zero.
Canceled	The Requisition Preparer canceled the requisition after it went through the approval and ordering process. Cancellation applies to both the original request and its associated orders. After a requisition has been canceled, there are no further actions users can take. Both the original requisition and its associated orders remain Canceled. If the intent is to change and re-issue the requisition, be sure to copy the requisition before canceling it.
Receiving	Some receiving has occurred. For example, partial receipts may be completed for some order line items, or items may have been rejected. A request may remain in the Receiving state for an extended period of time until all receipts are completed. While a receiver can close an order for receiving before all items have been received, it is recommended to enter a change order instead to reconcile the final order with the amount received.
Received	The order is closed—a requisition has been submitted and approved; the order has been sent; the goods have been shipped and received. Once a request has reached the Received state, it is final. Change orders cannot be processed against Received orders. However the order can be reopened so that a change order can be created. The Received state applies only to purchase requisitions and the associated orders.

Electronic Order Status

Orders sent to vendors electronically by the Ariba Supplier Network (ASN) can be tracked from the Orders tab. Orders that are printed and mailed are not tracked on ASN.

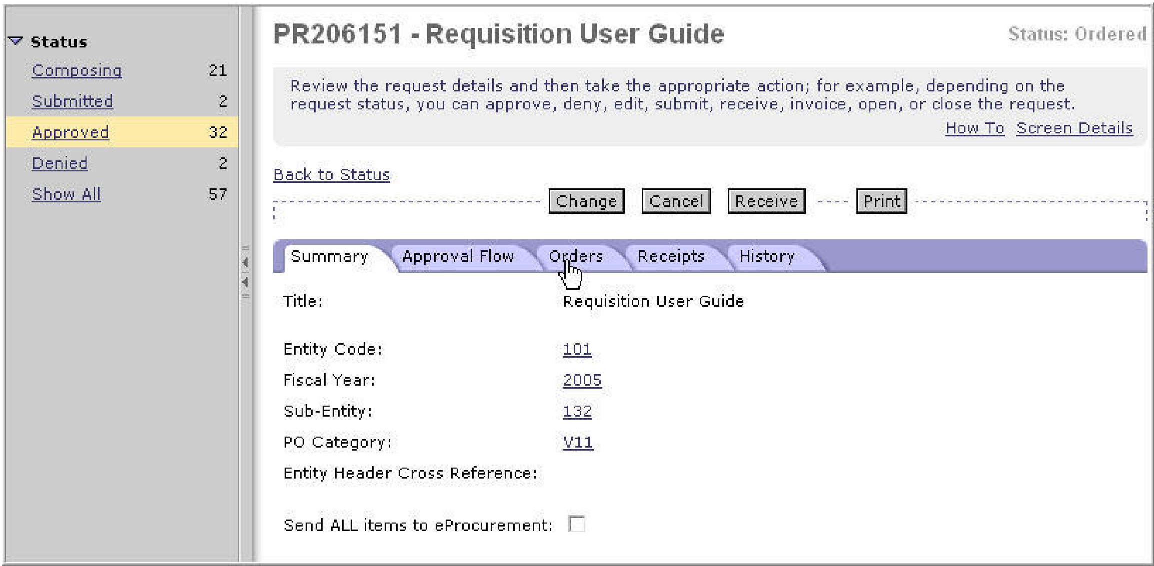
Vendors may choose to update the Order Status from their supplier Ariba account.

A buyer can view these updates by selecting **Status** from the Swoosh screen.

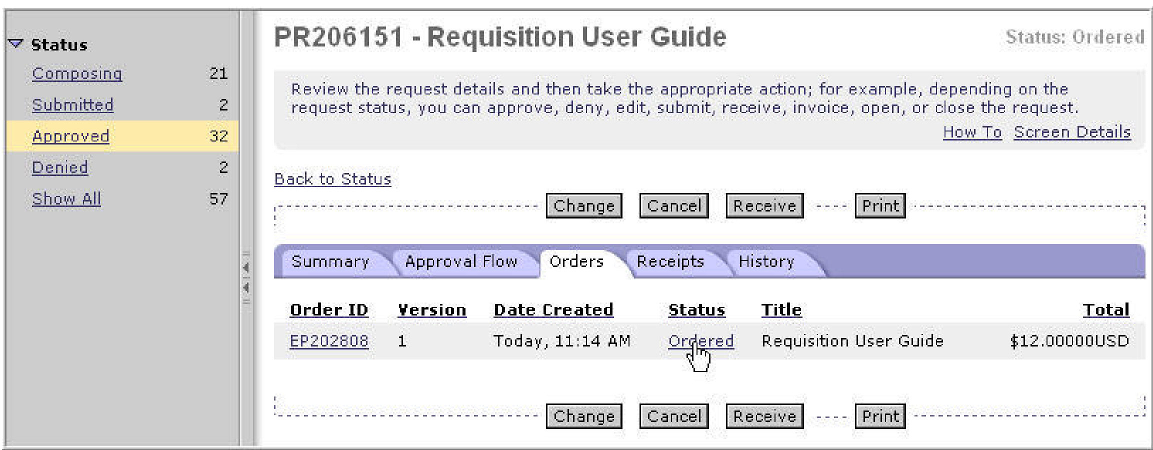


Find the requisition and select its **ID** or **Title**.

Select the Orders tab.



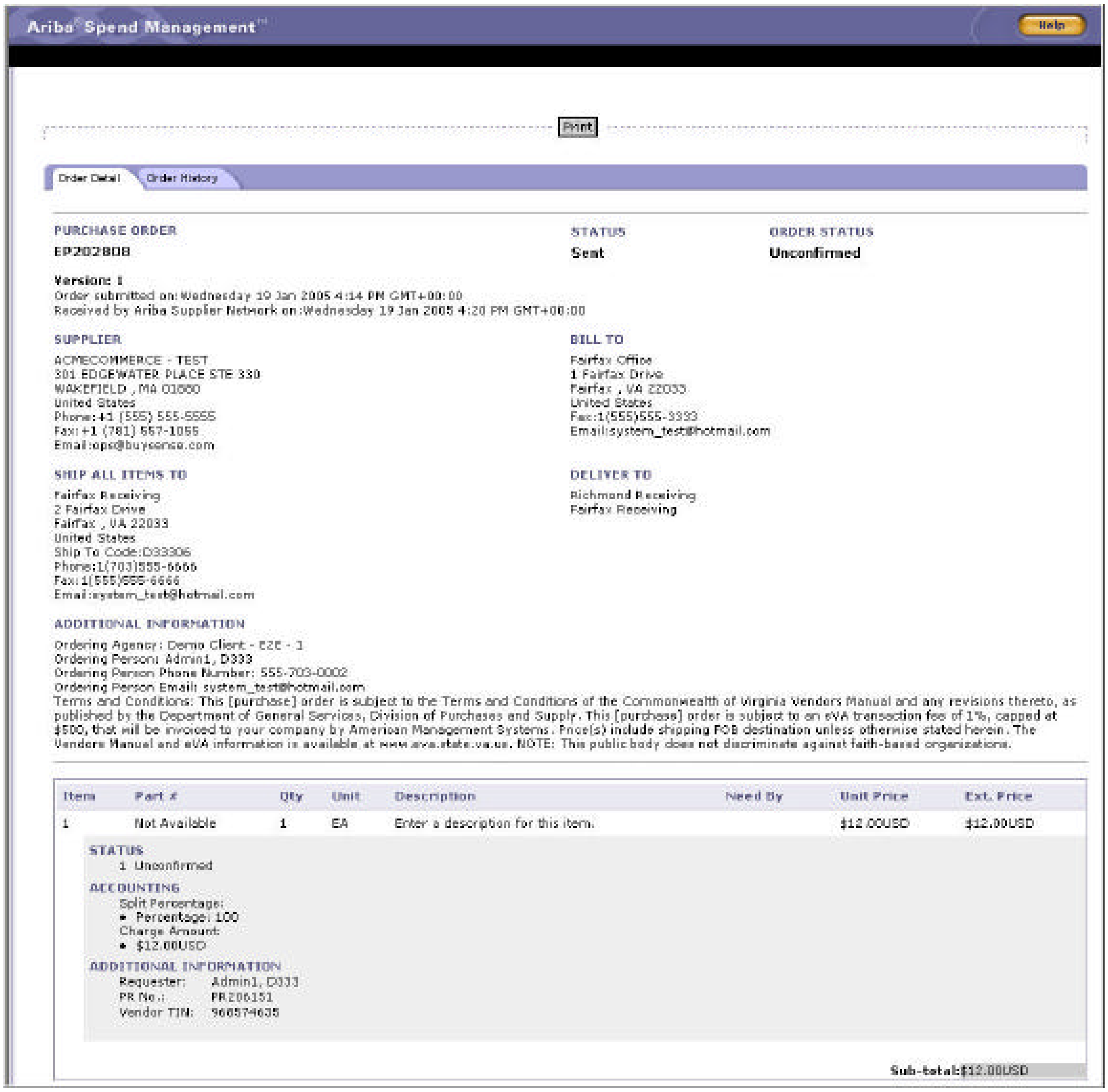
Select the **Ordered** link under the **Status** column.



Order Detail Tab

The Order Detail tab shows the status of the order. There are two statuses reported: Routing Status and Document Status.

Do not be alarmed if Order Status is *Unconfirmed*. Most vendors fail to confirm orders in Ariba, but it does not mean they did not receive the order.



Routing Status (Status)

Status shows whether your order has been delivered to the vendor successfully. If your requisition reached Ordered status, it will always be *Sent* or *Acknowledged*.

If your requisition is in Ordering status, the Routing Status may be Failed. Designated personnel handle failed orders internally to ensure that they reach the vendor. The buyer does not need to be concerned in this case.

Document Status (Order Status)

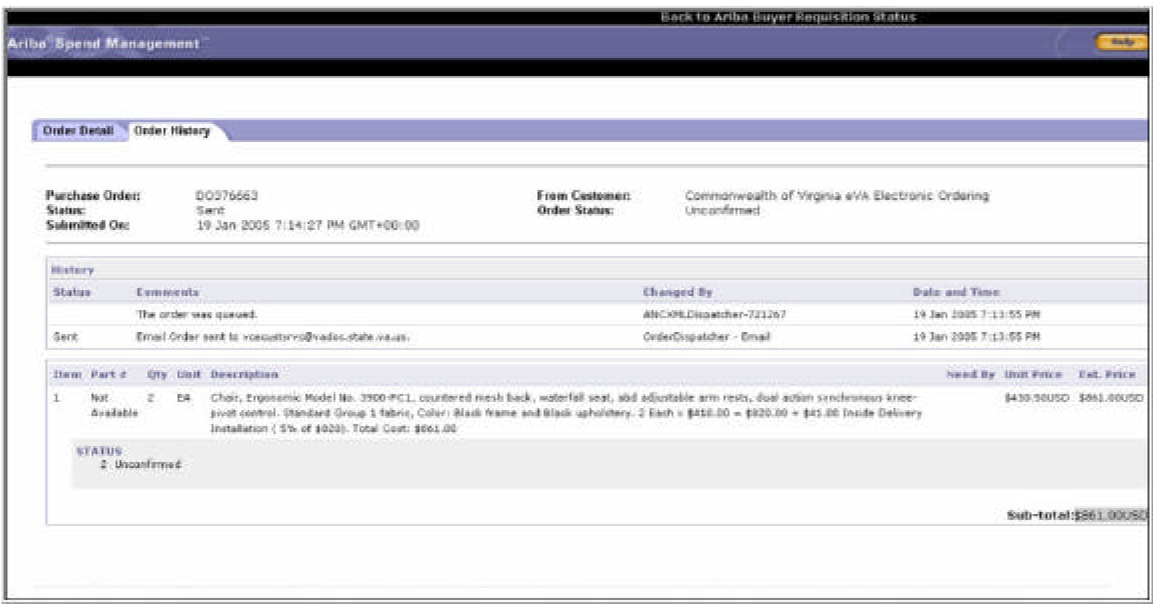
Order Status shows how the vendor has responded to the order, as follows:

Order Status	Definition
Unconfirmed	Initial state. The vendor has not updated order status inside its Ariba account.
Obsoleted	The order was canceled or replaced by a change order from the Buyer
Replaced	The order was changed by the Buyer.
Rejected	The vendor rejected all line items.
Confirmed	The vendor confirmed all line items.
Backordered	The vendor backordered all line items.
Shipped	Final state. The vendor shipped the entire order.

Order History Tab

Select the Order History tab from the top of the page.

The Order History Tab shows a detailed view of the order submission.



Note the method by which the vendor received the order. Often this area will display an email address or fax where the order was sent.

MODIFYING REQUISITIONS

Requisitions can be changed in a number of different ways depending on the status of the requisition and what you are trying to accomplish:

Requisition Status	Available Actions
Composing	Submit / Copy / Delete
Submitted	Withdraw / Copy
Denied	Withdraw / Copy
Ordered	Cancel / Copy / Change
Receiving	Close Order / Copy / Change
Received	Copy
Cancelled	None

This section will cover the following types of changes that you can make to requisitions:

- Copy a requisition to use as a template
- Delete a requisition you no longer need
- Edit a requisition to insert additional lines, change existing lines, or delete existing lines
- Withdraw a requisition that is in Submitted or Denied status
- Cancel a requisition in Ordered status
- Change a requisition in Ordered or Receiving status

Change Orders

Once an order has been delivered to a vendor, it may be necessary to issue a change order to the original order. In eVA, you can create a change order using the **Change** button on the current version of the requisition that created the active order.

Only the preparer of the initial requisition can create the change order.

Orders That Can Be Changed

Changes can be made to eMall orders in Ordered or Receiving status. Requisitions in other statuses will not display the **Change** button; other actions must be taken instead to get the order modified.

Modifying Requisitions Created in eMall

Requisition Status	Change Button?	Action to Modify Requisition
Composing	No	Edit
Submitted	No	Withdraw, then Edit (find the requisition in Composing status)
Approved	No	Edit
Denied	No	Edit
Ordered	Yes	Change
Receiving	Yes	Change; (cannot modify below quantity received)
Received	No	Reopen order, then change

A requisition that has not reached Ordered status has not created an order. The requisition can be edited or withdrawn instead. Once withdrawn, you will no longer find the requisition along with others in *Submitted* status, it's now back to Composing status.

An order in Received status has been closed. To make changes, you must reopen the order so that it will revert back to Receiving status. Refer to the eMall Vol. 2 User Guide for instructions.

Modifying Imported Requisitions when it is in Ordered status

Imported From	Special Condition	Change Button?	Comment
Interface (IRQ:)	Approved in eMall	Yes	Or change in ERP, re-import
	Approvals bypassed	No	Must change in ERP, re-import
Quick Quote (QQ:)		Yes	Make change in eMall
eProcurement (E2E:)	eProcurement vendors only	No	Make all changes in ADVANTAGE
	eMall vendor included	Yes	Changeable line has an **Edit** button. Other lines must be changed in ADVANTAGE

Features of Change Order Processing

Change Order is Replacement Order

The new order that is sent to the vendor contains all of the information necessary to act as a replacement order to the original (or previous) version of an order. All lines of an order are sent in the new version, whether they were changed or left untouched.

For example, suppose that Lines 1, 2, and 5 are changed on a 6-line order. The Change Order that is sent to the vendor will show all 6 lines with their current order amounts and quantities.

The new order sent to the vendor carries the words CHANGE ORDER at the top. It is recommended, however, that you insert a comment to inform the vendor of the change.

Modify lines to zero, but never delete them

While eVA allows you to delete lines using a change order, this change will not be sent to the vendor. Instead, you must modify the line to a zero quantity so that the changed line appears on the change order. The preparer should also add a comment to the line pointing out that the order has been changed to cancel that line.

Follow up with the vendor

Change Orders are clearly marked as Change Orders, whether they are sent electronically, printed, or faxed. It is wise to follow up with the vendor to ensure he properly understands the Change Order, particularly if you believe he may not be familiar with eVA Change Orders.

Changes That Can Be Made

Nearly everything on a purchase order can be changed. See the tables below for restrictions and special situations.

Header Changes

Header Field	Action	Comment
Use PCard	Change	Results in new "DO" or "EP" order. The original PCO number is NOT versioned; it is canceled. Be sure to enter a requisition comment warning the vendor NOT to duplicate the order
Other header field	Change	No restriction

Item Line Changes

Commodity Lines	Action	Comment
New Item Lines	Add	No restriction
Existing Item Lines	Delete	Cannot delete line if already received, or to make total order amount or quantity below zero. Deleted line is NOT sent to vendor; modify to zero instead. Changes to this field for items ordered from a punchout catalog will need to be made at the vendor's website, as directed by the system.
Quantity	Change	Cannot decrease below zero or quantity received, or to make total order amount or quantity below zero. For items selected from a punchout catalog, you must go to the EDIT Line Item screen and select the **Edit this Punchout Catalog Item** link.
Price	Change	Non-catalog items only
Unit of Measure	Change	Non-catalog items only
Description	Change	Non-catalog items only
Commodity Code	Change	Non-catalog items only
Other line item fields	Change	No restriction except punchout items may need to be handled separately (see

Processing a Change Order

To create a change order, the preparer actually processes a change to the Requisition that created the order. Selecting the **Change** button on the requisitions in Ordered or Receiving status opens a new version of a requisition for editing. The new version carries a sequential version number (e.g., V2) after the original requisitio n number.

To create a Change Order against an order in *Received* status, the order must be reopened. Refer to the Receiving User Guide.

Once the new version is ready, it is submitted like any other requisition. Once it passes through the Approval Flow the new versions of the related orders are created and sent to the vendors following the same rules and procedures as the original orders.

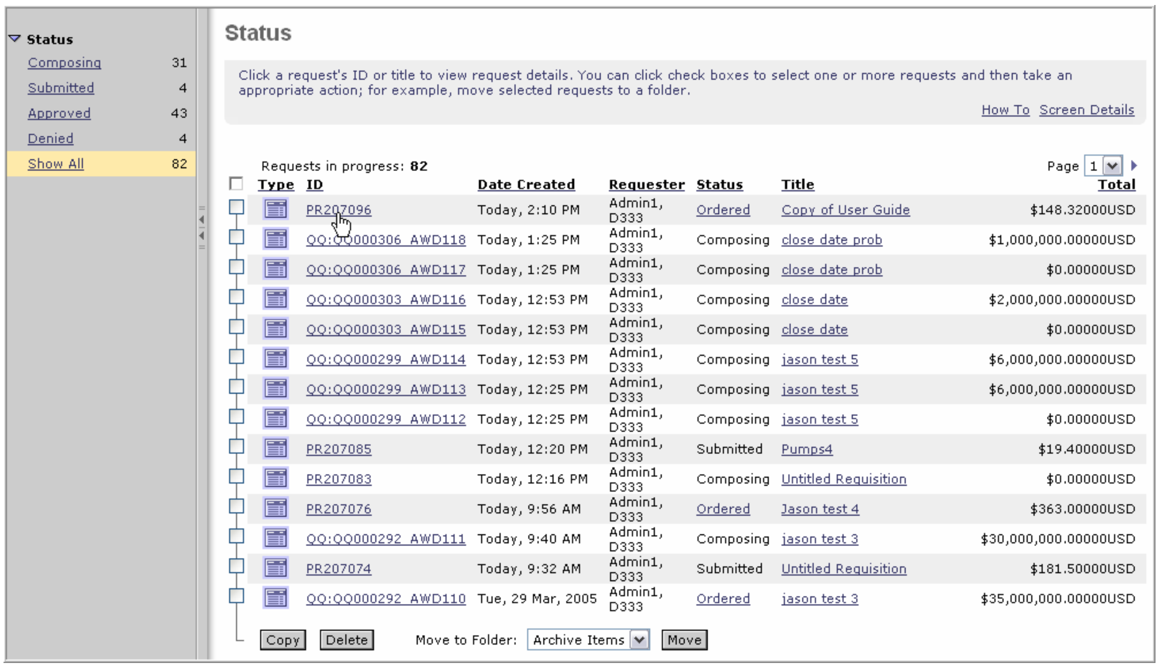
You can make repeated changes to orders. Each new requisition and order will receive the next version number in sequence.

The table below illustrates how a change in requisition PR123 creates new versions of orders.

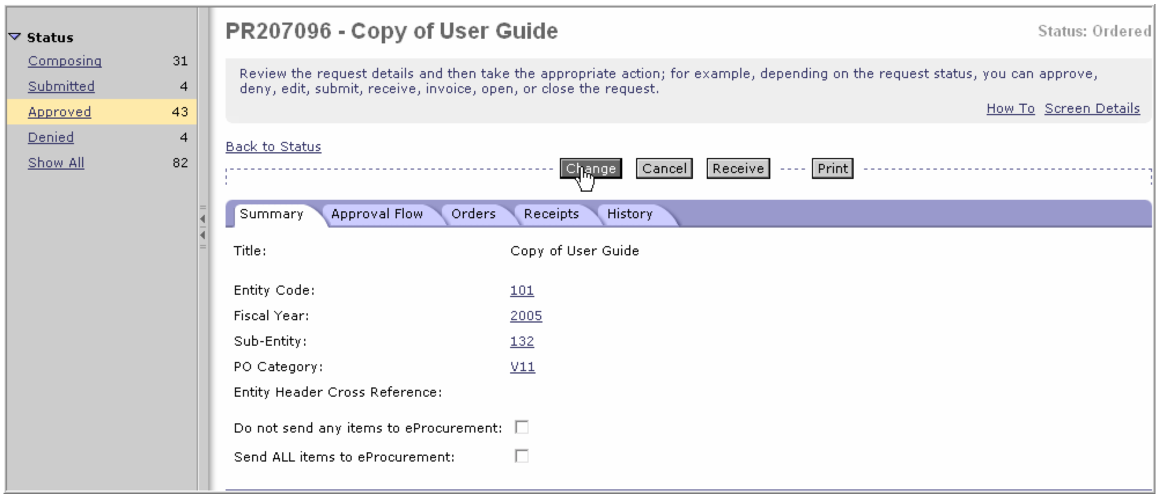
Requisition Change	Original PR	Original Orders	Resulting PR	Resulting Orders
Any Header Field (except PCard)	PR123	DO456, DO457	PR123-V2	DO456-V2, DO457-V2
Use PCard	PR123	DO456, DO457	PR123-V2	DO456 cancel, PCO788, DO457 cancel, PCO789
Any Line 1 Field	PR123	DO456	PR123-V2	DO456-V2
Any Line 2 Field	PR123	DO457	PR123-V2	DO457-V2

Steps for Creating a Change Order

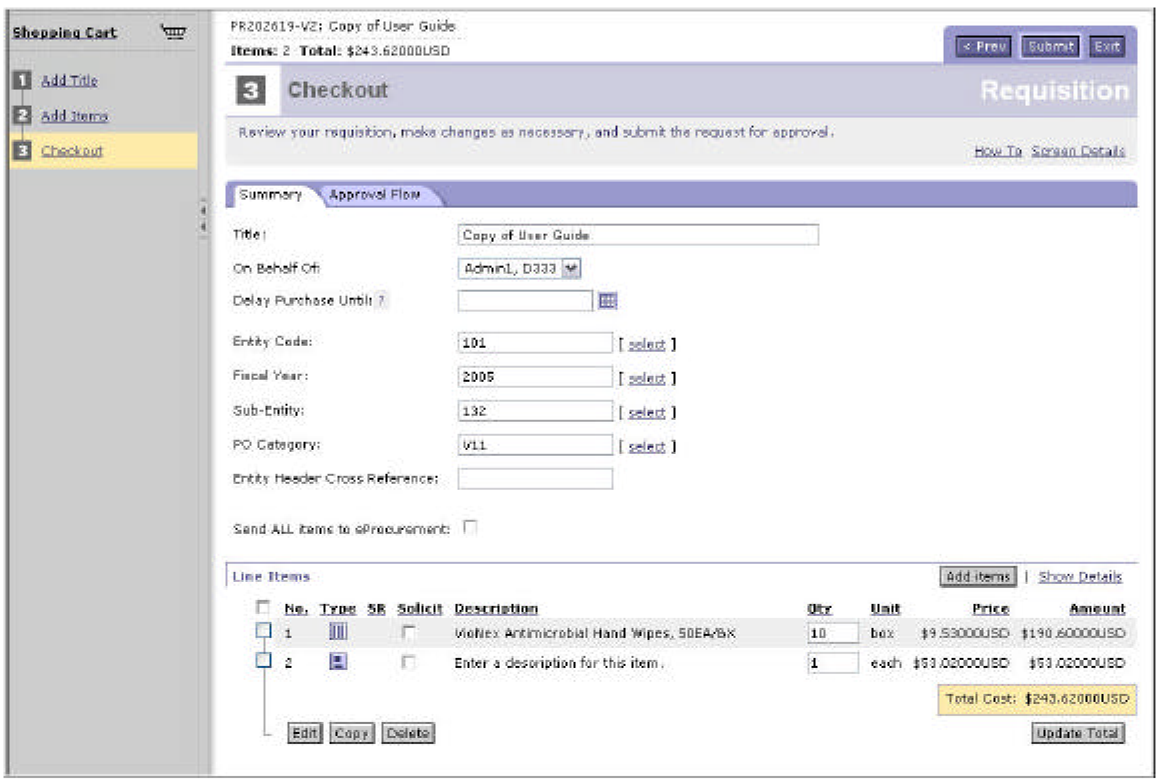
1. Select the Status button on the Swoosh screen.
2. Find the applicable requisition number and select its **ID** or **Title**.



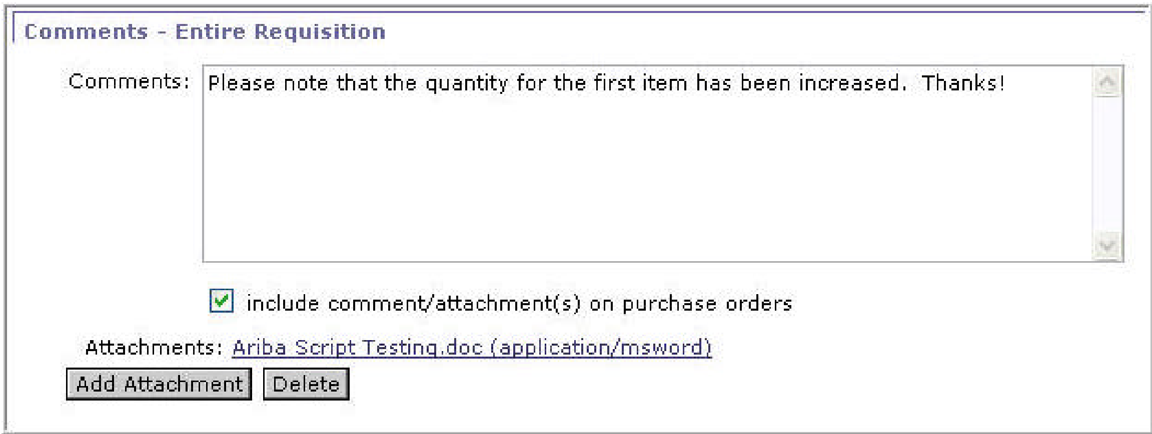
3. When the below screen appears, select the **Change** button at the top of the screen. (If the button is not visible, confirm that the requisition is in Ordered or Receiving status.)



4. At the Checkout screen, make the desired changes to the new version of the requisition. (To delete an item, modify the quantity to zero rather than deleting the line. Deleted lines are not sent to the vendor.)

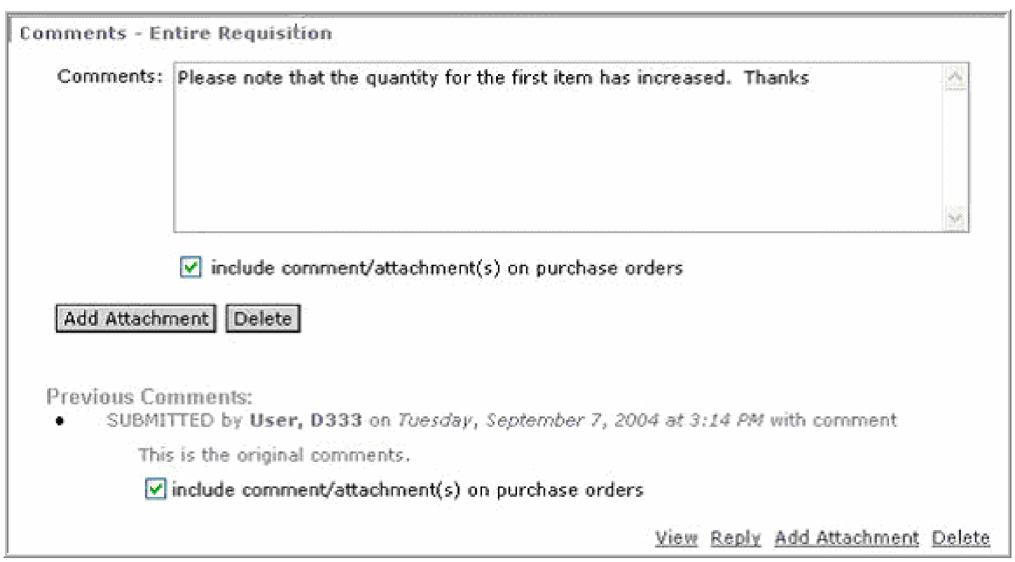


5. Add a comment clearly identifying the nature of the changes to the order and check the box below the comments.

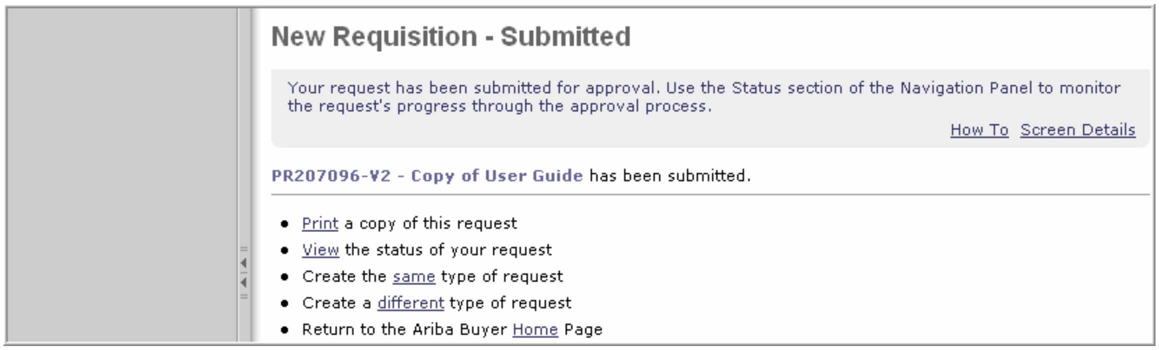


6. If a line item comment is more appropriate due to multiple orders on the same requisition, select the checkbox next to the line item you wish to make a comment to then select **Edit** to access the Edit Line Item screen. Select the **Add Comment** button.

7. Once completed, confirm that all attachments and comments from the original order still apply to the changed order. New comments and attachments are listed before existing ones. Prior comments and attachments can be deleted or modified by selecting the **Delete** link.



8. Select the **Submit** button to send the new version of requisition through the Approval Flow. You will see the same confirmation message when the revised requisition is submitted.



9. When the new version of the requisition is fully approved, the new version of the order is created and sent to the vendor as a Change Order. The prior request is no longer visible on the Approved list; it is replaced by the newer version of the requisition. You can still view original order information, however, under the History tab for that requisition. See below.

Tracking Change Versions through Order History

A new version of a requisition is created as soon as a preparer selects the **Change** button of an existing requisition.

A new version of a purchase order is created as soon as the changed requisition is fully approved and the ordering process begins.

As new versions of requisitions and orders are created, older versions become obsolete. In eVA, they are considered *Inactive*. Inactive orders will not show up on operational reports or status lists, but you can navigate to them through system searches and history tabs.

Deleting a Requisition

Only requisitions in *Composing* status may be deleted unless the requisition had been formerly submitted. If an order was previously submitted and then withdrawn, placing it back into *Composing* status, it cannot be deleted. Requisitions that have moved beyond *Composing* status must be canceled.

Select composing requisitions to delete by selecting their checkboxes and then selecting **Delete**.

Once you select **Delete**, the requisition will disappear from the status list and will be deleted from eVA.

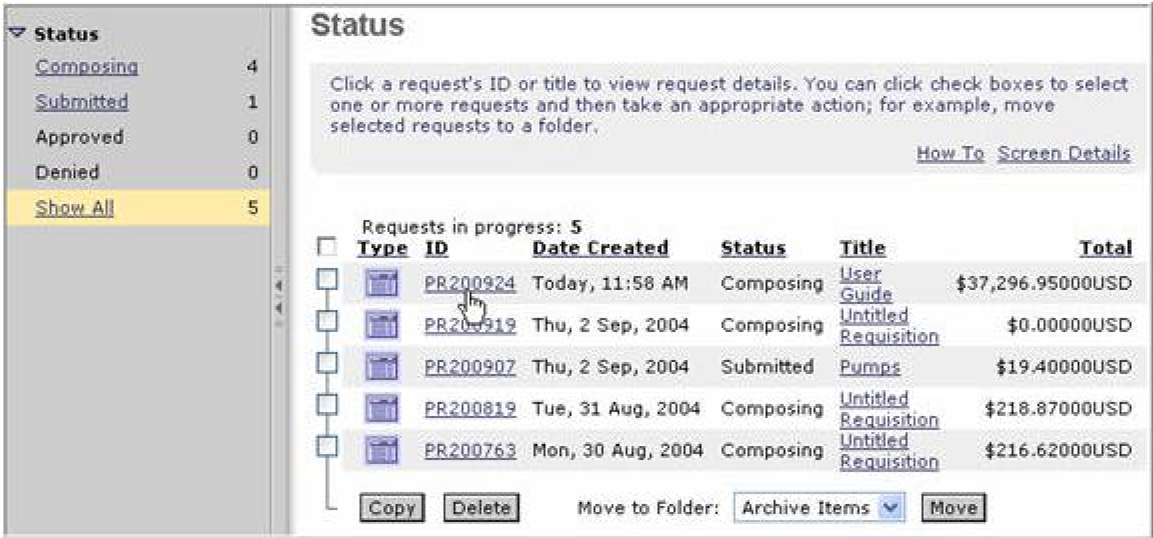
> *There is no way to undo a Delete action.*

Editing a Requisition

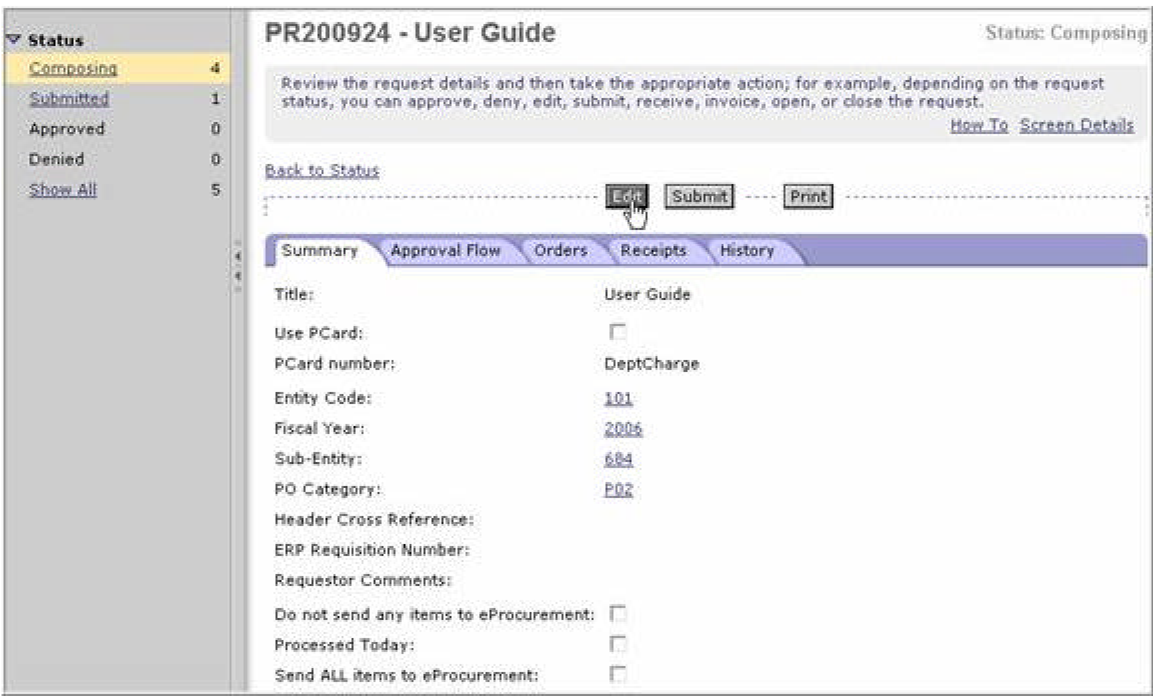
A requisition must be in Composing status for you to edit it. eVA allows you to edit all of the details on a requisition:

- **Add items** – you can add new items to the requisition
- **Multiple items** – you can edit the same information for more than one of the items on the requisition
- **Individual items** – you can edit individual items on the requisition. If the items were selected from a Punchout Catalog, however, it will be necessary for you to punch back out to that vendor's catalog to edit the existing item.

To edit a requisition, find it on a status list and select the appropriate **ID** or **Title**.



As the open requisition, select the **Edit** button.

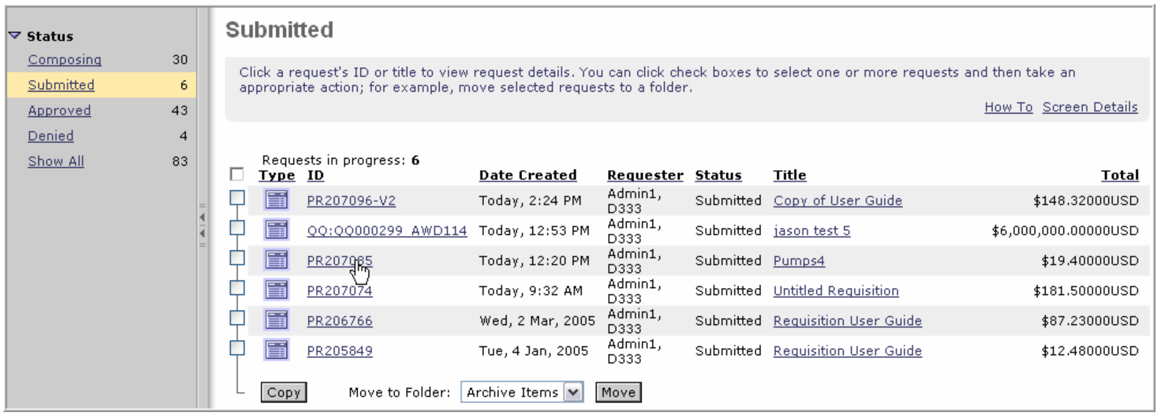


The requisition will open into the Checkout screen, where you can add/delete/copy items and change fields as needed. Select **Submit** to begin the ordering process.

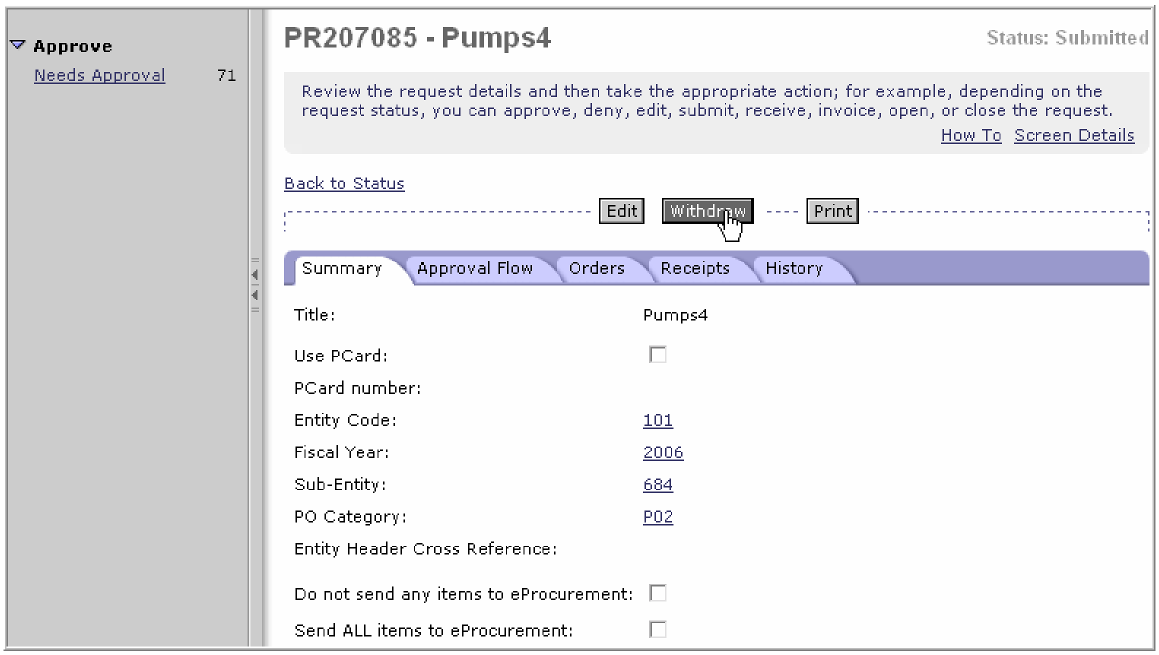
Withdrawing a Requisition

You can withdraw any requisition where the status is Submitted or Denied. These requisitions have not been fully approved.

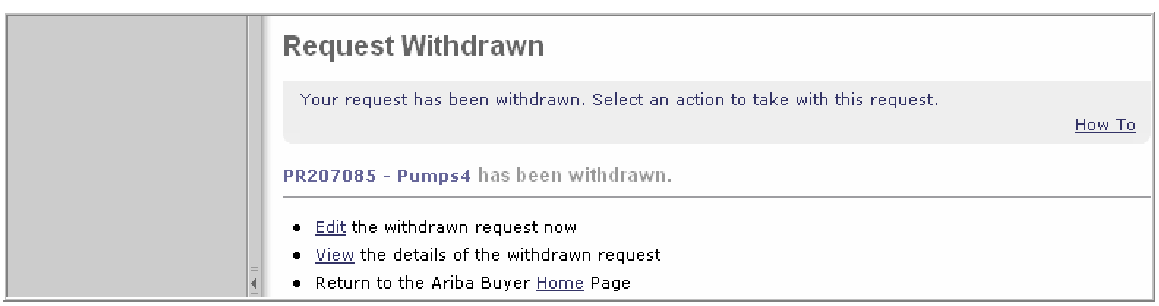
To withdraw a requisition, find the requisition and select the requisition's **ID** or **Title** link to open the request.



After selecting the Requisition from the status screen, select the **Withdraw** button to withdraw the requisition.



The Request Withdrawn screen confirms your action and offers you other links to continue with your work.



When you withdraw a requisition, its status changes back to Composing. From a Composing status, the requisition is treated like a new request - you can copy it, make changes and re-submit it, or delete it.

> *Once a requisition is in Ordered status, it cannot be withdrawn since the order is with the vendor. However, you may cancel the requisition.*

Canceling Orders

You can cancel a requisition that has been fully approved (*Ordered* status) where all associated orders have been sent to vendors. The cancellation action notifies the vendor of the change *if* that vendor has agreed to receive order cancellations through the Ariba Supplier Network. If the vendor is a print vendor and did not receive the order via the Ariba Supplier Network, be sure the print the cancelled order(s) and fax/mail it to the vendor.

If it is your intention to cancel an order and then copy it--- be sure to copy it BEFORE canceling the original order. Otherwise, your items will not copy over to your new requisition.

From the swoosh screen, select the Approved link on the left menu. From the Status list, find the requisition you want to cancel, then select its **ID** or **Title** to open it.

Once a requisition has a status of Receiving or Received, it cannot be canceled.

Canceling a requisition cancels all orders generated by that requisition. It is important not to cancel a requisition if you only want to cancel one of the generated orders. In that scenario, create a change order to modify the applicable order lines to zero.

When you select **Cancel**, the system will:

- Display a Comment Dialog box, where you can enter a comment explaining why you are choosing to cancel this order
- Remove all the approvals
- Send a notification message to buyers stating that the request is canceled
- Send cancellation order to the vendor for each canceled order
- Change the status to Canceled

COPYING A REQUISITION

The eMall allows you to create copies of existing requisitions to use as a template, regardless of its status. It is not recommended that you copy a cancelled PR, as the previous line items will not copy. Also, items originally ordered by way of a punchout catalog will not copy.

To copy a purchase requisition, find the requisition you wish to copy from the Status screen. Select the checkbox next to the requisition you wish to copy and select **Copy**.

A copy of the request appears at the top of the Status screen as shown on the screen below. Select the item for editing. All items will be updated with the current price from the vendor's catalog.

Make any necessary changes, then select **Submit** to begin the ordering process.

Refer to the [eMall Vol. 2 User Guide](#) for information about other eMall functionalities.

For general information on the eVA system, refer to the [eVA Overview Guide](#).